Asset Management Road-Map

Prepared for

NOOSA COUNCIL

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Acronyms and Abbreviations

AMP  Asset Management Plan
AMS  Asset Management System
IAM  Institute of Asset Management
ISO  International Standards Organisation
SAM  Self-Assessment Methodology (IAM assessment approach and tool)
Noosa Council Business Context

In Council’s current operational environment there is a strong focus on asset renewal and maintenance. With high community expectations, Council needs a robust Asset Management approach to maximise asset service lives whilst ensuring future financial sustainability.

From an asset management perspective, the 2014 de-amalgamation has left Noosa Council with a number of legacy issues related to asset data and support systems, but has provided the opportunity for Council to start its Asset Management development with a clean sheet.

The ISO55000 Standard represents current best practice in asset management, and Council has chosen to develop its Asset Management System with this Standard in-mind as a benchmark for future improvements.

CH2M was selected to assess Council’s current capability in asset management and based on this assessment, to assist in the development of an improvement plan or Road-Map to guide Council’s Asset Management into the future.
ISO 55000 and the Road-Map Development Approach

2.1 Introduction to ISO 55000

ISO 55000 is an International Standard that specifies the requirements for the establishment, implementation, maintenance and improvement of a management system for asset management. It consists of three parts, each covered by a separate document:

- ISO 55000: Asset Management - Overview, Principles and Terminology;
- ISO 55001: Asset Management - Management Systems - Requirements; and

The ISO 55000 overview document sets the context for the Standard and outlines the principles and nomenclature applied within it. The ISO 55001 document provides details of the requirements for compliance with the standard. It is this document that has been used to guide the Road-Map development and is the source of the clauses referenced in the Road-Map Initiatives section of this report. The ISO 55002 document supports the Standard by providing guidance for the application of an Asset Management System in accordance with ISO 55001.

There are 25 assessable elements that relate to clauses in the standard that, in aggregate, make up the ISO 55000 Asset Management System. These elements and the Asset Management Framework are presented in Figure 2-1 below:

Figure 2-1: ISO 55000 Asset Management Elements and Framework
2.2 Road-Map Development Approach

The development of Noosa Council’s asset management improvement plan (Road-Map) was undertaken in four stages, as follows:

1. An asset management gap analysis;
2. Creation of a Draft Improvement Plan;
3. Identification of Road-Map initiatives, through a series of collaborative workshops; and
4. Documentation of the Road-Map.

An overview of each of these stages is provided in the following sections:

2.2.1 Asset Management Gap Analysis

CH2M undertook a gap analysis of Noosa Council’s Asset Management maturity, using the Institute of Asset Management (IAM) Self-Assessment Methodology (SAM). The assessment comprised a review of all asset management documentation currently developed by Council, together with a series of targeted interviews with nominated Council staff responsible for elements of asset management delivery. The SAM guided planning and execution of both activities, providing comprehensive coverage, structure and reference to the ISO 55001 requirements.

The gap analysis resulted in a 1 to 5 maturity score for Council in the 25 Asset Management “capability elements” covered by ISO 55001. A score of 3 in all elements is required for ISO 55000 certification and any score below 3 is considered a “gap” for the purposes of the assessment. The maturity scoring is depicted in Figure 2-2 below:

![Maturity Assessment Scale](image)

**Figure 2-2: IAM Asset Management Maturity Assessment Scale**

CH2M’s Gap Analysis Report details the approach and findings of the Gap Analysis and also identified opportunities for improvement in each of the 25 capability elements. This was based on analysis of the documentation and interview outcomes and follow-on conversations with relevant Council staff. The improvement opportunities that were identified, their interdependencies and the potential for consolidation across capability areas provided the basis of the Draft Improvement Plan, described below.
2.2.2 Draft Improvement Plan

The development of an Asset Management improvement Road-Map is a daunting task for any organisation, regardless of its level of asset management maturity. Creation of a Draft Plan ahead of collaborative Road Map development can often be beneficial in expediting the development process.

The Draft Improvement Plan is a “first cut” of the Road-Map that has been created before all of the deliverable inputs have been considered or identified. It is by definition, rough, but it has the following advantages in a collaborative development environment:

1. It provides something to start from, other than a blank page – people work better together if they can discuss the merits and issues of something, rather than nothing;
2. It gives an indication of what the final Road-Map will look like and also what the contributors to development might need to consider, in terms of Road-Map element level of detail and interdependencies;
3. It makes the task of Road-Map development seem significantly less overwhelming for development contributors.

The Draft Improvement Plan for Noosa’s Road-Map was based on the improvement opportunities identified in the Asset Management Gap Analysis, and further refined, based on CH2M’s experience with Road-Maps developed for other clients. The initiatives identified in the Draft Improvement Plan have been grouped with reference to ISO 55001, to aid discussion on how each of these initiatives meet the requirements of the Standard.

2.2.3 Road-Map Development Workshops

Three Road-Map development workshops were held over two and a half days from the 16th to the 18th of May 2016. The primary objectives of each workshop were as follows:

**Workshop 1:**
1) To confirm Council’s drivers and objectives for the Road-Map;
2) To obtain a baseline understanding of the ISO 55000 Standard and its requirements; and
3) To present the Asset Management Gap Analysis and its findings.

**Workshop 2:**
1) To identify any initiatives or projects that might interface with the Road-Map;
2) To Clarify Council’s requirements for the Road-Map outputs;
3) To develop the Road-Map; and
4) To discuss Road-Map initiative resourcing, coordination, priorities and implications.

**Workshop 3:**
1) To finalise Council’s Road-Map; and
2) To discuss the next steps.

The Road-Map workshops were attended by approximately 12 Council staff, all of whom were respondents in the Gap Analysis targeted interview process. Collectively, these attendees represented key stakeholders in the asset management system. The list of workshop attendees is presented in Appendix A of this report. All attendees were engaged in the discussions, providing constructive and practical input throughout the two and a half days.
The final output of the workshop was a Gantt chart showing:

- the Road-Map initiatives identified;
- their indicative timeframe;
- their primary resources;
- their anticipated duration; and
- their interdependencies.

In addition, CH2M gathered a significant volume of notes during the course of the workshops, capturing attendee feedback that may be relevant to the Road-Map or its initiatives. These notes were a key resource in the refinement and documentation of the Road-Map following the workshops.

2.2.4 Road-Map Documentation

Documentation of the Road-Map ensures that everyone at Council has a clear understanding of what activities the Road-Map comprises and their benefits. Clear documentation of the specific steps and resource requirements of each initiative also allows Council to prioritise and plan for Road-Map delivery.

Documenting the Road-Map was a two-stage process:

1. Filling-in the detail of the initiatives developed in the workshop to meet Council’s stated requirements; and
2. Recording the process of Road-Map development and presenting each Road-Map initiative in the agreed format and level of detail.

This report represents the output of the second stage of this process. It is CH2M’s intention that once Council approves this document, it becomes a “living document”. That is, it will be refined and augmented as necessary to capture the influences of other initiatives at Council and to reflect current and future resource availabilities. In this respect, the Road-Map will most effectively be delivered as a programme, where benefits are tracked and these benefits influence the priority and timing of tasks under the programme.
Road-Map Initiatives

3.1 Introduction

This section of the report provides the detail of the Road-Map initiatives collectively developed in the Road-Map development workshops and subsequently refined by CH2M post-workshop. For simplicity, each initiative has been detailed separately and provides sufficient detail to enable Council to plan and deliver the identified tasks as a discrete package of work. Detail has been also provided on the dependencies between each initiative, other Road-Map initiatives and other Council initiatives and/or projects outside the scope of the Road-Map.

Indicative delivery timings, key resources and levels of effort have also been provided for each initiative, based on the workshop deliberations and CH2M’s best estimates. The delivery timings have deliberately been specified in three categories that provide Council with a level of flexibility to balance competing resource demands. For clarity, these categories are presented in the table below:

<table>
<thead>
<tr>
<th>Delivery Timeframe</th>
<th>Indicative Delivery Timing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Short (1 year)</td>
<td>Now to end of the 2016/2017 Financial Year</td>
</tr>
<tr>
<td>Medium (2-4 years)</td>
<td>2017/2018 Financial Year to 2020/2021 Financial Year</td>
</tr>
<tr>
<td>Long (&gt; 4 years)</td>
<td>Beyond the 2019/2021 Financial Year</td>
</tr>
</tbody>
</table>

In this report, more detail has been provided on the Initiatives to be delivered in the short timeframe, to enable resource and budget planning. Details for the proposed medium and long-term initiatives, which may depend on the outcomes of earlier initiatives, can be discussed internally at Council and documented.

Where Council Managers have been identified in the development workshops as leads for a given initiative, these have been documented. CH2M has also identified where Council may need external support to complete an initiative either for reasons of capacity or due to the specific nature of the tasks.

The Road-Map initiatives developed for Council are presented in the form of a Gantt chart in Appendix A, with resource and timing summarised in tabular form in Appendix B. Details of each Road-Map Initiatives are provided on the following pages.
3.2 Road-Map Initiative Details

3.2.1 Asset Management System Enablers

Develop the Draft Improvement Plan and Report

Description of the Initiative:
Noosa Council commissioned CH2M to assess the Council’s current asset maturity and provide a plan of future improvements (the “Road-Map”) that will utilise the ISO 55000 International Asset Management Standard as a benchmark. The Road-Map presented in this Report defines the asset management way forward for Council and is of sufficient detail to allow Council to scope tasks, plan resources and track achievement on its asset management journey.

Council Lead(s)
Asset Planning Co-ordinator, Asset Management Steering Team

ISO 55001 Reference:

4.4 Asset Management System: Developing a staged program to build Council’s Asset Management System.

5.1 Leadership and Commitment: Ensuring that the Asset Management Policy, the SAMP and Asset Management Objectives are established and are compatible with the organisational objectives.

Interfaces with existing Council Initiatives:

Draft AMP Road-Map Provides insights into Council plans for Asset Management Plan development.

Draft T1 AMS Road-Map Provides insights into Council plans for Asset Management Information System development.

Mobility Project: Defines a key mechanism for operationalising Council’s Asset Management System in the future.

Data Validation Project: Review, rationalising and cleansing of Council’s asset data.

Asset Register Consolidation: Development of an accurate, single database supporting Council’s Asset Register.

SMEC Model Update: Data collection and calibration of Council’s SMEC Pavement Management System.

Project Delivery Toolkit: Includes development of a workflow for streamlined capture of asset data from As-Constructed drawings.

Building Condition Assessment: Collection of condition data for Council’s building assets.

Pool Equipment Condition Assessment: Collection of condition data for Council’s pool equipment Assets.

Bridge Condition Assessment: Collection and management of condition data for Council’s bridge assets.


Dependencies with other Road-Map Initiatives:

Covers all Road-Map initiatives.

Potential Benefits:

The Road-Map will provide clear guidance on the activities to be delivered under Council’s asset management improvement program, reference to ISO 55000 requirements, scope, resourcing requirements and benefits. The Road-Map will also provide the baseline on which programme progress and benefits achievement will be measured.

Scope of Work:

<table>
<thead>
<tr>
<th>Task No.</th>
<th>Task Description</th>
<th>Resources</th>
<th>Approx. Duration</th>
<th>Delivery Timeframe</th>
<th>Deliverable / Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Complete the Asset Management Improvement Road-Map for Noosa Council</td>
<td>CH2M</td>
<td>1 month</td>
<td>Short</td>
<td>Improvement Road-Map</td>
</tr>
<tr>
<td>2</td>
<td>Draft and finalise Asset Management Improvement Road-Map Report</td>
<td>CH2M</td>
<td>2 weeks</td>
<td>Short</td>
<td>Improvement Road-Map Report</td>
</tr>
</tbody>
</table>

Refine Asset Management Governance Arrangements

Description of the Initiative:

The asset management gap analysis highlighted that Council has an active and engaged Steering Team, providing guidance and decision-making on matters related to asset management development. This analysis also noted that there was evidence to suggest a strong correlation between staff understanding of Council’s asset management status and how closely linked, organisationally, these staff were to Steering Team members.

The establishment and clear documentation of an asset management governance structure that clarifies and builds on the good work already done by the Steering Team would be relatively simple to achieve and yield significant benefits. It would not only strengthen asset management decision-making, but also ensure a one-Council approach to asset management into the future. In addition, it would define a two-way path of communication between the Steering team and the majority of Council staff.

The proposed governance structure should be clearly documented and include roles and responsibility statements for all key players in the structure. Consideration should also be given to documenting the method of capture and communication of asset management issues and decisions made. The agreed governance structure and support mechanisms should meet all of the pre-existing corporate governance policies and procedures already established at Council.

Council Lead(s)

Asset Planning Co-ordinator, Asset Management Steering Team, NSC Management Team

Interfaces with existing Council Initiatives:

- **Mobility Project**: Provides a mechanism for guidance / approval of future additional Project scope.
- **Asset Condition Assessment Projects**: Ensures consistency of the condition data collected and ultimately, alignment with the Asset Information Strategy.
Dependencies with other Road-Map Initiatives:

Develop the Asset Management System Change Management Approach: The Asset Management Governance arrangements will be a key mechanism for reviewing and implementing change.

ISO 55001 References:

4.2 Understanding the Needs and Expectations of Stakeholders: Determining the criteria for asset management decision-making

4.4 Asset Management System: Documenting system components

5.1 Leadership and Commitment: Supporting and role-modelling cross-functional working

5.3 Organisational Roles, Responsibilities and Authorities: Assigning responsibility and authority for ensuring the adequacy, ongoing suitability and effectiveness of the Asset Management System

8.2 Management of Change: Identification and assessment of change

9.3 Management Review: A documented and systematic approach to Management review

Potential Benefits:

Development and documentation of a robust asset management governance structure for Council will increase internal and external stakeholder confidence that asset management decisions are receiving an appropriate level of consideration. It will also assure a high level of transparency in future decision-making.

On the assumption that the governance structure developed will preside over the full range of asset management decision-making from operational to strategic, the resulting structure will also be an excellent mechanism for future asset management communication and knowledge-sharing.

Scope of Work:

<table>
<thead>
<tr>
<th>Task No.</th>
<th>Task Description</th>
<th>Resources</th>
<th>Approx. Duration</th>
<th>Delivery Timeframe</th>
<th>Deliverable / Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Develop draft governance structure for consideration / refinement by Council</td>
<td>Council</td>
<td>2 weeks</td>
<td>Short</td>
<td>Draft Governance Structure Proposal</td>
</tr>
<tr>
<td>2</td>
<td>Refine, seek approval of and institutionalise proposed structure</td>
<td>Council</td>
<td>1 month</td>
<td>Short</td>
<td>Agreed Governance Structure and Responsibility Matrix Governance players assigned and active</td>
</tr>
</tbody>
</table>
Develop the Asset Management System Change Management Strategy

**Description of the Initiative:**

The level of support for asset management at Council is high and there is high level of enthusiasm from staff to improve Council’s asset management approach. Even in this positive environment, there is a risk of staff fatigue if change management is not considered early in the roll-out of the Road-Map programme and defined in a robust Change Management Strategy.

The Change Management Strategy should articulate Council’s proposed approach to identifying and addressing the impact of future changes to Council’s Asset Management System on staff and other stakeholders. Given Council has only started development of its Asset Management System, the initial focus of this Strategy should be on:

- Gauging the change impact of the proposed Road-Map initiatives; and
- Identification of measures to manage these impacts and streamline delivery.

With regard to the latter point, appropriate measures could include: awareness-raising (of initiative scope and benefits); early resource planning/allocation and preparation to meet expected demand; progress/benefits reporting; and celebrating task completion.

As Council’s Asset Management System becomes more developed, the focus of the Change Management Strategy will shift to identifying and addressing changes/refinements to the Asset Management System and their human resource impacts.

The Change Management Strategy will inform some of the content delivered under the Asset Management Communications Framework and will need to be aligned with this Framework.

**Council Lead(s)**

Asset Management Coordinator, Human Resources Manager

**Interfaces with existing Council Initiatives:**

N/A

**Dependencies with other Road-Map Initiatives:**

Develop the Asset Management Communications Framework: *Communications will be one component of the change management approach*

**ISO 55001 Reference:**

8.2 Management of Change: *Identification and assessment of change*

**Potential Benefits:**

Development of an Asset Management System Change Management Strategy will put in-place a mechanism for identifying factors that may influence the Asset Management System in the future and for managing any changes necessary. Such a mechanism will not only improve Council’s ability to plan for such changes (due to potentially increased lead-times), but also increase the general resilience of the Asset Management System.
Scope of Work:

<table>
<thead>
<tr>
<th>Task No.</th>
<th>Task Description</th>
<th>Resources</th>
<th>Approx. Duration</th>
<th>Delivery Timeframe</th>
<th>Deliverable / Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Engage with Council’s HR Branch to establish an appropriate change management approach.</td>
<td>Council</td>
<td>1 month</td>
<td>Short</td>
<td>Agreed change management approach for the asset management system</td>
</tr>
<tr>
<td>2</td>
<td>Develop and/or integrate any necessary change management documentation and protocols.</td>
<td>Council</td>
<td>3 months</td>
<td>Medium</td>
<td>Existing documents modified or new documents developed to support AMS change.</td>
</tr>
</tbody>
</table>

Develop the Asset Management Communications Framework

Description of the Initiative:

CH2M found that communication related to Council’s Asset Management System was good among Managers and staff directly involved in asset management guidance, development and delivery. It was noted however, that these communications have been somewhat ad-hoc, in terms of the stakeholders targeted and the channels of communication applied. It was also noted that the level of asset management awareness of staff not directly involved in asset management deteriorates significantly.

It is recognised that development of Council’s Asset Management System is in its infancy and as a result, there is limited tangible material to communicate about the System at this stage. It would be useful however, to establish a Communications Framework for sharing and dissemination of asset management knowledge ahead of this information becoming available.

Council’s Asset Management Communications Framework would clearly articulate the internal and external stakeholders that it would be beneficial to communicate with and outline a strategy to engage with them. The Framework would also present such details as:

- The most appropriate communication channel to adopt for each stakeholder group;
- The nature and frequency of the communications to and from these groups; and
- The person(s) in Council that will be responsible for creation, distribution and capture of the information or materials communicated.
- Triggers or intervals for reviewing some or all of the Framework.

It is recommended that the Asset Management Communications Framework considers all relevant current stakeholder engagement activities and that it is developed in collaboration with staff who take carriage of communication activities at Council. This will ensure that opportunities to leverage these existing activities and that the communications that go out are consistent with Noosa’s unique branding.

In the recent Road-Map planning workshops held with Council staff, it was indicated that a staged approach to the development of the Communications Framework would be preferred, focusing on internal communications in the first instance and with external communications following at a later date. Council’s Road-Map reflects this requirement by separating the Communications Framework into internal and external components, with different delivery dates.
Council Lead(s)
Community Engagement Manager, Asset Management Steering Team

Interfaces with other Council Initiatives:
Various Branch-led stakeholder engagement activities.

Dependencies with other Road-Map Initiatives:
Develop the Asset Management System Change Management Strategy: *Informs specific communication measures and messages related to change management.*

Asset Management Awareness: *Defines much of the content to be delivered under the Communications Framework.*

ISO 55001 References:
7.4 Communication: *Planning and documenting what asset management information is communicated, with whom and how.*

4.2 Understanding the Needs and Expectations of Stakeholders: *Identifying asset management system stakeholders and their communication needs*

5.1 Leadership and Commitment: *Establishing a mechanism to communicate the importance of meeting asset management requirements*

Potential Benefits:
Development and documentation of the Asset Management Communications Framework will embed an approach that is consistent, effective and efficient. It will not only capture stakeholder needs, but also:

- raise the awareness of stakeholders and staff of Council’s asset management objectives;
- inform Council staff about the current status of Asset Management System development; and
- become the vehicle for change management related to the Asset Management System.

Scope of Work:

<table>
<thead>
<tr>
<th>Task No.</th>
<th>Task Description</th>
<th>Resources</th>
<th>Approx. Duration</th>
<th>Delivery Timeframe</th>
<th>Deliverable / Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Develop draft Communications Framework for Internal stakeholders</td>
<td>Council</td>
<td>2 weeks</td>
<td>Short</td>
<td>Draft Communications Framework (internal)</td>
</tr>
<tr>
<td>2</td>
<td>Refine, seek approval of and institutionalise Communications Framework (internal)</td>
<td>Council</td>
<td>1 month</td>
<td>Short</td>
<td>Agreed Communications Framework (internal)</td>
</tr>
<tr>
<td>3</td>
<td>Develop draft Communications Framework for external stakeholders</td>
<td>Council</td>
<td>1 month</td>
<td>Medium</td>
<td>Draft Communications Framework (external)</td>
</tr>
<tr>
<td>4</td>
<td>Refine, seek approval of and institutionalise Communications Framework (external)</td>
<td>Council</td>
<td>3 months</td>
<td>Medium</td>
<td>Agreed Communications Framework (external)</td>
</tr>
</tbody>
</table>
3.2.2 Develop the SAMP (Context of the Organisation)

Asset Management System Scope

Description of the Initiative:

To promote transparency and to aid understanding of the Asset Management System, Council will need to determine the scope of its Asset Management System to suit its current operating context. This determination needs to address:

- The scope of assets managed under the system;
- The Council functions that the system will ultimately support; and
- All interfaces between the Asset Management System and other Council Management Systems.

This determination must be documented and could be achieved by modifying or adding relevant statements in Council’s Asset Management documentation as necessary. These documents would include:

1. The Asset Management Policy;
2. The SAMP; and
3. The individual Asset Management Plans.

In support of this task, it is recommended that the development of a “block diagram”, showing the major components of Council’s proposed Asset Management System and other Council interfacing functions and Management Systems be undertaken. Annex B of the ISO 55000 document presents the elements of an ISO 55000-compliant asset management system and is a good starting point for this block diagram. This diagram is provided in Figure 3-2 overleaf:
Where Council intends to develop separate Asset Management Plans, divided along functional, asset class and facility lines, the rationale for these choices should be clearly stated in the SAMP. This will:

- ensure that all users of the Asset Management System have a clear understanding of where to find guidance on a specific asset; and
- assist with clarifying the boundaries of these plans, ensuring that there are no assets within the scope of the Asset Management System that are missed or covered twice in the plans.

**Council Lead(s)**
Asset Planning Co-ordinator, Asset Management Steering Team

**Interfaces with existing Council Initiatives:**
N/A

**Dependencies with other Road-Map Initiatives:**

Review / Update Asset Management Policy: Informs any scoping statements made in the updated Policy.

**ISO 55001 Reference:**

4.3 Determining the Scope of the Asset Management System: Establishing the boundaries and suitability of the Asset Management System to achieving organisational objectives.
Potential Benefits:
Provides clarity on the scope and boundaries of the Asset Management System, which enables more efficient development and operation of Asset Management System components. Clearer understanding of the boundaries of the Asset Management System with other Council Management systems also allows investigation of the protocols, reporting and data transfers required at these interfaces.

Scope of Work:

<table>
<thead>
<tr>
<th>Task No.</th>
<th>Task Description</th>
<th>Resources</th>
<th>Approx. Duration</th>
<th>Delivery Timeframe</th>
<th>Deliverable / Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Agree scope of assets covered in Asset Management System</td>
<td>Council</td>
<td>2 weeks</td>
<td>Short</td>
<td>Agreed list of assets within the scope of the Asset Management System.</td>
</tr>
<tr>
<td>2</td>
<td>Develop a “block diagram” showing the elements of Council’s AMS and their connectivity to other Council functions / Management Systems.</td>
<td>External Support</td>
<td>2 weeks</td>
<td>Short</td>
<td>Block Diagram of Council’s AMS</td>
</tr>
<tr>
<td>3</td>
<td>Document rationale for Asset Management Plan scopes and priorities</td>
<td>Council</td>
<td>1 month</td>
<td>Short</td>
<td>Rationale for AMP scopes, provided in SAMP.</td>
</tr>
</tbody>
</table>

Environmental Scan

Description of the Initiative:
An Environmental Scan assists in building an understanding of the external factors that influence Council’s decision-making which may in-turn, influence the objectives, nature and scope of the Asset Management System. It is recommended the PESTLE\(^1\) approach be adopted when undertaking an environmental scan, as it ensures consideration of the majority of external factors that influence decision-making, as depicted in Figure 3-1, to the right:

Some data gathering is required to support the PESTLE analysis, but the analysis itself is best undertaken within a facilitated workshop environment with nominated Council staff. The workshopping approach is not only cost/time-effective, but provides a forum that promotes collaboration and ownership” of the analysis outcomes.

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\(^1\) The PESTLE approach investigates the primary factors that contribute to business decision-making, as follows: Political, Economic, Social, Technological, Legal and Environmental.
During this workshop, it is strongly recommended that the attendees also carry-out a SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis, based on the outcomes of the PESTLE analysis. This analysis builds on the PESTLE analysis outcomes to identify:

1. How well placed Council is to respond to the influences identified; and
2. What courses of action Council might consider.

CH2M acknowledges that it was agreed in the Road-Map development workshops to incorporate the outcomes of the Environmental Scan carried out, to support development of Council’s new Corporate Plan. The approach detailed above provides Council with an insight into the typical Environmental Scan applied to SAMP development, for its consideration.

Council Lead(s)
Executive Manager, Asset Planning Co-ordinator

Interfaces with existing Council Initiatives:
N/A

Dependencies with other Road-Map Initiatives:
Asset Management Scope: May influence the Scope of the Asset Management System.

ISO 55001 References:
4.3 Understanding the Organisation and its Context: Determining the external issues that are relevant to the organisation’s purpose and that affect the ability to achieve intended Asset Management System outcomes.

Potential Benefits:
A clear and documented understanding of all of the external factors that currently influence Council that may have a bearing on the scope and objectives of the Asset Management System.

A documented list of opportunities and threats related to the external influences identified, which may influence the scope and/or objectives of the Asset Management System.

Scope of Work:

<table>
<thead>
<tr>
<th>Task No.</th>
<th>Task Description</th>
<th>Resources</th>
<th>Approx. Duration</th>
<th>Delivery Timeframe</th>
<th>Deliverable / Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Data gathering for PESTLE / SWOT analysis (optional)</td>
<td>Council</td>
<td>1 month</td>
<td>Short</td>
<td>Supporting data for the PESTLE / SWOT Workshop</td>
</tr>
<tr>
<td>2</td>
<td>1 day PESTLE and SWOT Analysis Workshop (optional)</td>
<td>Council, External Provider</td>
<td>1 week</td>
<td>Short</td>
<td>PESTLE and SWOT Analysis Report</td>
</tr>
</tbody>
</table>

Stakeholder Analysis

Description of the Initiative:
The Asset Management Gap Analysis revealed that individual Council branches generally have a good understanding of the internal and external stakeholders of the assets they are directly responsible for. The Analysis did not however, find a lot of evidence that knowledge of these asset stakeholders and their needs is centralised and shared with other branches or processed from a whole-of-portfolio perspective. A current Stakeholder Analysis will address this shortcoming.

The first step of a Stakeholder Analysis for Council will be to formalise Council’s approach to Asset Management System Stakeholder Analysis. This Road-Map Report provides some detail on the
analysis process, but it will need to be refined to reflect Council’s current practices to ensure practicality and efficiency of implementation. It is envisaged that the outcome of this step will be a Guideline document for reference by Council staff and a Template that ensures capture of relevant stakeholder data.

Once the analytical approach has been established, the second step will largely be a task of consolidating and validating the current stakeholder information available to the various Council branches. Salient information that needs to be captured about these stakeholders include:

• Who the stakeholders are;
• What assets these stakeholders have an interest in;
• Why the assets are important to them (including evidence);
• Stakeholder asset performance requirements and needs;
• Key stakeholder contacts and their current mode of engagement; and
• All current sources of stakeholder data gathered.

Once this data has been gathered, Council will be in a position to analyse the stakeholder data and determine:

1. The level of influence or each stakeholder (group);
2. Whether any stakeholders are missing;
3. The nature and frequency of stakeholder information to capture;
4. The alignment of stakeholder requirements with Council objectives;
5. Streamlined methods of capturing stakeholder feedback in the future; and
6. The most effective mechanism for storage and dissemination of stakeholder information.

The findings of the Stakeholder Analysis may be presented in a dedicated Report or be incorporated in an over-arching Corporate Asset Management Plan – if Council chooses to develop such a document. Regardless of this choice, the findings of this analysis should be reflected and addressed in the relevant individual Asset Management Plans and associated Branch Plans.

Council Lead(s)
Asset Planning Co-ordinator, Community Engagement Manager, Asset Management Steering Team, Asset Management Working Group(s)

Interfaces with existing Council Initiatives:
N/A

Dependencies with other Road-Map Initiatives:

Asset Management Scope: *May influence the Scope of the Asset Management System.*

Refine Structure of Asset Management Governance Arrangements: *To identify the Asset Management Working Group(s) members that will contribute to the Stakeholder Analysis.*

ISO 55001 Reference:

4.3 Determining the Scope of the Asset Management System: *Identifying asset management system stakeholders and their needs*

Potential Benefits:

A comprehensive and current view of stakeholders of Council’s Asset Management System and their needs. This knowledge-base will underpin Council’s Asset Management objectives and the service levels that will be applied within the Asset Management System. The more accurately this
knowledge-base reflects stakeholder needs and their relative priorities, the more cost-effectively Council can plan and deliver required service levels to its stakeholders.

Scope of Work:

<table>
<thead>
<tr>
<th>Task No.</th>
<th>Task Description</th>
<th>Resources</th>
<th>Approx. Duration</th>
<th>Delivery Timeframe</th>
<th>Deliverable / Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>Consolidate current stakeholder information.</td>
<td>Council</td>
<td>2 months</td>
<td>Short</td>
<td>A consolidated knowledge-base of stakeholder information</td>
</tr>
<tr>
<td>3</td>
<td>Analysis of / reporting on gathered stakeholder information</td>
<td>Council External Provider</td>
<td>1 month / 2 weeks</td>
<td>Short / Short</td>
<td>Asset Stakeholder Report / Stakeholder Section for CAMP</td>
</tr>
</tbody>
</table>

Asset Management Objectives (Levels of Service)

Description of the Initiative:

CH2M found evidence of both strategic and operational levels of service being applied to assets during the course of the Asset Management Gap Analysis. It was also found that opportunities exist to improve consistency and coverage of these levels of service across Council’s asset portfolio as well as their linkage to defined Council service levels (i.e. “Line-of-sight”).

It is recommended that Council will need to develop and populate a Level of Service framework for the assets that are within the scope of its Asset Management System. This Framework will align with the objectives stated in Council’s Corporate Plan and provide – as much as possible – clear linkages between asset-specific condition/performance (the asset-owner perspective) and customer Levels of Service (the service-delivery perspective) to guide all levels of asset decision-making.

Developing the Levels of Service Framework would be undertaken in two main steps:

1. Documentation of what asset levels of service are currently tracked by Council; and
2. Development of the Levels of Service Framework.

The second step will be informed not only by the gaps identified in the existing service levels, but the results of the Stakeholder Analysis and Asset Management System scoping that will be carried-out before this initiative. It is important to note that the Framework developed will not articulate all of the Asset Levels of Service. These will be developed separately, as part of the incremental roll-out of Asset Management Plans.
Council Lead(s)
Asset Planning Co-ordinator, Asset Management Steering Team

Interfaces with existing Council Initiatives:
Development of Council’s Corporate Plan: Council’s Asset Management Objectives need to be in alignment with business objectives presented in Council’s Corporate Plan.

Dependencies with other Road-Map Initiatives:
Stakeholder Analysis: A key input to the development of appropriate Levels of Service.
Asset Management System Scope: Defines the Asset s that the levels of service will apply to and potentially influences the nature of the service levels developed.

ISO 55001 References:
6.2.1 Asset Management Objectives: The organisation shall establish asset management objectives at relevant functions and levels.
5.1 Leadership and Commitment: Ensuring that the Asset Management Policy, the SAMP and Asset Management Objectives are established and are compatible with the organisational objectives.

Potential Benefits:
The completed Levels of Service Framework will define triggers for asset intervention and investment that will be more transparently linked to Council’s stated objectives and stakeholder needs. Uniform coverage of service levels across the asset portfolio that cascade to defined objectives will also inform allocation of Council resources to most efficiently achieve these objectives.

The Levels of Service Framework developed will also be a valuable resource for engaging with stakeholders as it will transparently demonstrate the trade-offs required to balance asset service levels and available resources. This improved understanding will enable Council to work with asset stakeholders to set realistic service level expectations for Council’s asset portfolio.

Scope of Work:

<table>
<thead>
<tr>
<th>Task No.</th>
<th>Task Description</th>
<th>Resources</th>
<th>Approx. Duration</th>
<th>Delivery Timeframe</th>
<th>Deliverable / Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Document currently available Levels of Service</td>
<td>Council</td>
<td>1 month</td>
<td>Short</td>
<td>A list of current Levels of Service and the assets they relate to.</td>
</tr>
<tr>
<td>2</td>
<td>Develop Level of Service Framework</td>
<td>Council External Support</td>
<td>6 months</td>
<td>Medium</td>
<td>A comprehensive Framework of Asset Service Levels that provide transparent “line-of-sight”</td>
</tr>
</tbody>
</table>
Asset Management Decision-Making

Description of the Initiative:
A robust Asset Management Decision-making Framework ensures that Council achieves its Asset Management Objectives (i.e. maximises its Levels of Service) with the resources available, at least risk.

Council already has a decision framework for the assessment of Capital Projects that is aligned with Corporate Objectives and existing support/governance mechanisms. The opportunity to apply and/or refine this “8-Point Score” approach for asset management decision-making purposes, operational and maintenance funding in-particular, was identified in the Road-Map workshops and this task could potentially be a quick win for Council.

Review of this methodology for Asset Management purposes would need to take into account the Stakeholder Analysis and Asset Management Objectives tasks identified in the Road-Map. It is anticipated that some augmentation of the current approach may be required to address the specific requirements of certain asset classes and stakeholder groups.

Ultimately, the decision-making criteria and method of assessment / prioritisation for specific Assets will be defined by the nominated Asset Owners in Council, captured in dedicated Asset Strategies and documented in the relevant Asset Management Plans.

Council Lead(s)
Asset Planning Co-ordinator, Asset Management Steering Team, Asset Management Working Group(s)

Interfaces with existing Council Initiatives:
“8-Point Score” approach for Capital Project Assessment.

Dependencies with other Road-Map Initiatives:
Asset Management Objectives: Defines the levels of service that will underpin future asset management decision-making.

Failure / Root Cause Analysis: The results of these analyses will have a significant influence on operational asset decision-making.

ISO 55001 Reference:
6.2.1 Planning to Achieve Asset Management Objectives: The organisation shall determine and document the method and criteria for decision-making and prioritising the activities and resources to achieve its asset management plan(s) and asset management objectives.

Potential Benefits:
The definition and documentation of a Decision-making Framework for Council’s assets that is aligned to Council’s Asset Management Objectives will improve the transparency and consistency of asset management decision-making. It will also ensure that investments made in Council assets and the activities these investments support are targeted to stakeholder needs and mitigate business/operational risks to the greatest extent possible.

The clear documentation of the Asset Management Decision-making Framework also provides a foundation for improvement of decision-making, as evidence of the effectiveness of this framework becomes available in the future.
Scope of Work:

<table>
<thead>
<tr>
<th>Task No.</th>
<th>Task Description</th>
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<th>Approx. Duration</th>
<th>Delivery Timeframe</th>
<th>Deliverable / Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Review and refine as necessary, current “8-point score” approach for asset</td>
<td>Council</td>
<td>1 month</td>
<td>Medium</td>
<td>Use of “8-point score” approach as an asset management decision-tool.</td>
</tr>
<tr>
<td></td>
<td>management purposes.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Develop asset management decision-making criteria for individual Asset</td>
<td>Council</td>
<td>2 months</td>
<td>Short</td>
<td>Documented asset management decision-making criteria</td>
</tr>
<tr>
<td></td>
<td>Management Plans</td>
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</tr>
</tbody>
</table>

Develop Council’s Preliminary SAMP

Description of the Initiative:

A SAMP is a foundational document that specifies an organisation’s asset management objectives and its proposed approach to achieving them. It should be aligned with and support Council’s Corporate Plan and Asset Management Policy. Unlike the Asset Management Plans, which have an asset-centric service level and investment focus, the SAMP has more of a capability focus. In this context, it details the activities and processes that Council puts into place to build and continually improve its Asset Management System.

Key components of Council’s SAMP will be:

1. A comprehensive description of the Asset Management System, it’s scope of influence over Council functions and it’s interface with other Council Management Systems;
2. Clear definition of the scope of assets covered by Council’s Asset Management System;
3. Details of the internal and external factors that might influence the Asset Management System and how Council intends to manage any changes resulting from these influences in the future;
4. Details of the requirements, expectations and relative influence of all parties with a stake in the in-scope assets (the asset stakeholders);
5. Council’s rationale for grouping of assets under a common Asset Management Plan;
6. The asset-related decision-making criteria that Council will apply to each asset group represented in an Asset Management Plan;
7. Council’s current improvement plan for the Asset Management System (including the Road-Map initiatives, in the first instance);
8. Current and potential future risks and opportunities related to the Asset Management System; and
9. Council’s approach to reviewing and continually improving the Asset Management System;

A representative SAMP Template will be provided to Council under the current Road-Map commission, taking into account the components described above.

It can be seen that much of the material for the SAMP components identified above will be developed under preceding Road-Map initiatives. These will form the basis of a preliminary SAMP that will evolve and improve as Council’s Asset Management maturity increases.
Council Lead(s)
Asset Planning Co-ordinator, Asset Management Steering Team, Asset Management Working Group(s)

Interfaces with existing Council Initiatives:
N/A

Dependencies with other Road-Map Initiatives:
- Asset Management Scope: Prerequisite for SAMP Creation.
- Environmental Scan: Prerequisite for SAMP Creation.
- Stakeholder Analysis: Prerequisite for SAMP Creation.
- Asset Management Objectives (Corporate Levels of Service): Prerequisite for SAMP Creation.
- Asset Management Decision-Making: Prerequisite for SAMP Creation.
- Develop Asset Management Competency Framework and Plan: Prerequisite for SAMP Creation.

ISO 55001 Reference:
- 4.4 Asset Management System: The organisation has a SAMP, which is derived from its Organisational Plan, is aligned with this Plan, the Asset Management Policy and the Scope of the Asset Management System.

Potential Benefits:
The SAMP describes Council’s Asset Management System and articulates the mechanisms that will be put in-place to ensure its effectiveness and continual improvement. It transparently links Council’s Asset Management approach to stated corporate objectives and informs asset decision-making that is strategic and aligned with stakeholder needs.

Scope of Work:

<table>
<thead>
<tr>
<th>Task No.</th>
<th>Task Description</th>
<th>Resources</th>
<th>Approx. Duration</th>
<th>Delivery Timeframe</th>
<th>Deliverable / Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Develop a SAMP Template for Council</td>
<td>Council</td>
<td>1 month</td>
<td>Short</td>
<td>SAMP Template.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>External Provider</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Develop and document a preliminary SAMP</td>
<td>Council</td>
<td>3 months</td>
<td>Medium</td>
<td>Preliminary SAMP Document.</td>
</tr>
</tbody>
</table>

3.2.3 Leadership
Review / Update Asset Management Policy

Description of the Initiative:
CH2M’s review of Council’s Asset Management Policy found this document to be generally in accordance with ISO 55000. It is anticipated however, that during the course of delivering the Asset Management Road-Map presented in this Report, there will be a need to review the Policy to capture new learnings and retain alignment with other Asset Management System documentation developed.

Review of Council’s current Asset Management Policy is expected to be evolutionary rather than revolutionary and the resourcing and timing presented in the Report reflects this. It is recommended that the proposed review be undertaken once the preliminary SAMP is completed, as this will allow the review to take advantage of the outcomes of the Definition of Asset Management Scope, Environmental Scan and Stakeholder Analysis.
Council Lead(s)
Asset Planning Co-ordinator, Asset Management Steering Team, External Provider

Interfaces with existing Council Initiatives:
N/A

Dependencies with other Road-Map Initiatives:
Development of Council’s Preliminary SAMP: Prerequisite for Asset Management Policy Review.

ISO 55001 References:
5.2 Asset Management Policy: Top Management will establish an Asset Management Policy.
5.1 Leadership and Commitment: Top Management shall... ...ensure that the Asset Management Policy, SAMP and Asset Management Objectives are compatible with organisational objectives.

Potential Benefits:
Council Leadership demonstrate their commitment to development of the Asset Management System and sets the principles for this system through the Asset Management Policy.

Scope of Work:

<table>
<thead>
<tr>
<th>Task No.</th>
<th>Task Description</th>
<th>Resources</th>
<th>Approx. Duration</th>
<th>Delivery Timeframe</th>
<th>Deliverable / Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Refine existing Council Asset Management Policy</td>
<td>Council External Provider</td>
<td>1 month</td>
<td>Short</td>
<td>Revised Asset Management Policy</td>
</tr>
</tbody>
</table>

Develop Asset Management Roles and Responsibilities

Description of the Initiative:
Once the scope of Council’s Asset Management System has been agreed, there is a need to clarify specific roles, accountabilities and responsibilities for staff contributing to any component of the System. A key requirement for developing these roles and responsibilities is a comprehensive understanding of the workflows and processes that contribute to the Asset Management System. Documentation of these is covered in Section 4.2.5 of this Report.

Once the workflows and processes related to the Asset Management System have been documented, it is recommended that a RACI Chart be developed that covers all process steps identified. This chart will identify Council staff that are responsible for delivering each process step, the person accountable for signing the work off, who needs to be consulted, and who needs to be informed.

Development of the RACI Chart is most efficiently carried out through a series of workshops, possibly linked to specific asset management workflows. Most value will be gained from these workshops if they are facilitated by a person that is familiar with Asset Management practices and the ISO 55000 Framework in-particular and attended by a senior Human Resources representative from Council.

Council Lead(s)
Asset Planning Co-ordinator, Human Resources Manager
Interfaces with existing Council Initiatives:
- Existing Council competency / skills tracking mechanisms

Dependencies with other Road-Map Initiatives:
- Asset Management Scope: Defines scope of roles and accountabilities.
- Refine the Structure of AM Governance Arrangements: Influences staff lines of reporting and decision escalation paths.

ISO 55001 Reference:
- 7.1 Resources: The organisation shall determine and provide the resources needed for the establishment, implementation, maintenance and continual improvement of the asset management system.

Potential Benefits:
The development of Asset Management roles and responsibilities will clarify the competencies necessary to sustain Council’s Asset Management System and allow Council to recruit or develop these competencies, as necessary. Clear understanding of the roles and responsibilities of key staff in Council’s Asset Management System also give staff members more certainty of the part they play in asset management and allow for succession planning for these staff, where business continuity is a risk.

Scope of Work:

<table>
<thead>
<tr>
<th>Task No.</th>
<th>Task Description</th>
<th>Resources</th>
<th>Approx. Duration</th>
<th>Delivery Timeframe</th>
<th>Deliverable / Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Review of existing responsibility matrices.</td>
<td>Council</td>
<td>2 months</td>
<td>Medium</td>
<td>Understanding of current responsibilities.</td>
</tr>
<tr>
<td>2</td>
<td>Development of a comprehensive RACI Chart for Council’s Asset Management System.</td>
<td>Council</td>
<td>3 months</td>
<td>Medium</td>
<td>RACI Charts for the Asset Management System.</td>
</tr>
</tbody>
</table>

3.2.4 Planning

Develop Risk Assessment Methodology and Framework

Description of the Initiative:
A robust and transparent methodology and framework for the assessment of risks and opportunities related to the Asset Management System needs to align with the existing risk management approach employed by Council. The resulting assessment framework needs to address risks and opportunities related to all levels of the Asset Management System:

1. Council;
2. Customer / Stakeholder; and
3. Assets.

Council already has a mature risk assessment approach and associated risk / opportunity register in-place. The risk assessment requirements of the Asset Management System need to be determined to identify how these requirements can be integrated within Council’s current risk identification, reporting, escalation and mitigation arrangements. It is anticipated that only minor modifications will be required to Council’s existing risk assessment approach and that the majority of work in this area will be in developing the asset management-specific materials that will be considered under this framework.
Council Lead(s)
Governance Advisor, Asset Planning Co-ordinator, Asset Management Steering Team

Interfaces with existing Council Initiatives:
Council’s existing Risk Management Approach
Council’s existing Internal Audit Approach

Dependencies with other Road-Map Initiatives:
N/A

ISO 55001 References:
6.1 Actions to Address Risks and Opportunities for the Asset Management System: The organisation shall determine the risks and opportunities that need to be addressed to: give assurance that the asset management system can achieve its intended outcome(s); prevent, or reduce undesired effects; and achieve continual improvement.
6.2.2 Planning to Achieve Asset Management Objectives: When planning how to achieve its asset management objectives, the organisation shall determine and document... 
...actions to address risks and opportunities associated with managing the assets.
5.1 Leadership and Commitment: Top Management shall... ...ensure that the approach used for managing risk in asset management is aligned with the organisation’s approach to managing risk.

Potential Benefits:
Completion of this initiative will ensure that risks and opportunities at all levels of the Asset Management System are identified and assessed on the same basis as other Council risks. This consistency of assessment will ensure that Council takes a balanced view of all opportunities and risks and that its response to these risks is scoped and prioritised appropriately.

Scope of Work:

<table>
<thead>
<tr>
<th>Task No.</th>
<th>Task Description</th>
<th>Resources</th>
<th>Approx. Duration</th>
<th>Delivery Timeframe</th>
<th>Deliverable / Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Determine Asset Management System risk / opportunity assessment requirements.</td>
<td>Council</td>
<td>2 months</td>
<td>Short</td>
<td>AMS Risk Assessment needs identified.</td>
</tr>
<tr>
<td>2</td>
<td>Modify Council’s Corporate Risk Assessment Approach, as necessary.</td>
<td>Council</td>
<td>18 Months</td>
<td>Short to Medium</td>
<td>Revised corporate risk management approach.</td>
</tr>
</tbody>
</table>

Develop Asset Investment Planning Framework

Description of the Initiative:
The Asset Investment Planning Framework defines the generic procedures and support tools that will be applied to enable the identification, assessment, prioritisation and approval of all asset investments. To maximise Council visibility of asset whole-of-life costs this framework needs to have coverage of the full spectrum of expenditures across the asset life-cycle: including initial capital outlay, upgrade, renewal, maintenance and operational expenditure. In this context, the final framework is likely to augment or integrate with a number of existing Council asset investment review and approval processes.
The Framework will provide specific detail on Council’s asset investment planning, as it relates to:

- Options analysis;
- Business case evaluation;
- Prioritisation;
- Resource analysis;
- Risk assessment; and
- Governance.

**Council Lead(s)**

Director Corporate Services, Asset Management Steering Team

**Interfaces with existing Council Initiatives:**

Existing Council capital project review and approval mechanisms.

**Dependencies with other Road-Map Initiatives:**

- Asset Management Decision-Making: Defines some of the criteria that will apply under the Investment Planning Framework.
- Refine the Structure of Asset Management Governance Arrangements: Will be the structure applied to review and approval of investments covered by the Asset Investment Planning Framework.
- Asset Management Process Mapping and Data Analysis: Will document the workflow, processes and tools that support the Asset Investment Planning Framework.

**ISO 55001 References:**

7.3 Awareness: Persons doing work under the organisation’s control, who can have an impact on the achievement of the asset management objectives, shall be aware of... their work activities... and how they relate to each other.

8.1 Operational Planning and Control: The organisation shall plan, implement and control the processes needed to meet requirements...

**Potential Benefits:**

Development of the Asset Investment Planning Framework will provide Council with an opportunity to re-cast existing asset investment planning processes and support tools to cover the entire asset life-cycle. Documentation of the Framework promotes more detailed and consistent understanding of the asset investment planning workflow by Council staff, which will improve their ability to make more beneficial contributions to it.

**Scope of Work:**

<table>
<thead>
<tr>
<th>Task No.</th>
<th>Task Description</th>
<th>Resources</th>
<th>Approx. Duration</th>
<th>Delivery Timeframe</th>
<th>Deliverable / Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Review of existing Council asset investment review / approval processes</td>
<td>Council</td>
<td>2 months</td>
<td>Medium</td>
<td>Opportunities to leverage existing processes/ tools. Any workflow “gaps” identified.</td>
</tr>
<tr>
<td>2</td>
<td>Document the Asset Investment Planning Framework</td>
<td>Council</td>
<td>4 months</td>
<td>Medium</td>
<td>The Asset Investment Planning Framework.</td>
</tr>
</tbody>
</table>
Develop Asset Management Delivery Platform

Capture of Asset Management Requirements in Contracts

Description of the Initiative:
Once the requirements of Council’s Asset Management System are understood, Council should consider the staged revision of contracts that have an asset management component to address these requirements. Specific considerations would include:

- Transferring responsibility for meeting Level of Service requirements;
- Clarifying asset specific roles related to the contracts (who maintains what);
- Defining requirements for asset condition or performance assessment (either carried-out by the contracted entity or the provision of access so others can);
- Formalising responsibilities for any asset reporting required by Council’s Asset Management System; and
- Ensuring transfer of any intellectual property rights to Council, where these may become an operational liability in the future.

CH2M does not currently have sufficient understanding of Council’s existing contracts and their nature to form a view on the level of effort required by this initiative. Depending on the number and level of standardisation of these contracts, any required changes may be dealt with on a contract-by-contract basis or through the development of appropriate contract pro-forma/templates.

To ensure that future contracts related to asset management function achieve the best outcomes for Council, Guidelines should be developed to assist Council staff to select the most appropriate Form of Contract for the assets or services being sought. Specific considerations addressed in these Guidelines would include:

- Balancing risk-transfer, quality of delivery and cost;
- The criticality of the assets/services covered in the contract scope;
- The level of prescription and/or compliance with Council Standards appropriate;
- The potential for economies of scale or other economic benefits; and
- The focus on performance or output.

Council Lead(s)
Procurement and Fleet Manager, Asset Planning Co-ordinator, Asset Management Steering Team

Interfaces with existing Council Initiatives:
N/A

Dependencies with other Road-Map Initiatives:

Asset Management Objectives: Defines the levels of service that may be transferred as performance objectives under the contract.

Develop Asset Management Plans: The Asset Management Plans will define the asset-specific levels of service and reporting requirements that may be transferred under the contract.
ISO 55001 Reference:

8.3 Outsourcing: The organisation shall determine:

a) the processes and activities that are to be outsourced (including the scope and boundaries of the outsourced processes and activities and their interfaces with the organisation’s own processes and activities);

b) the responsibilities and authorities within the organisation for managing the outsourced processes and activities;

c) the processes and scope for the sharing of knowledge and information between the organisation and its contracted service provider(s);

Potential Benefits:

Alignment of Council’s asset-oriented contracts with the Asset Management System will ensure greater visibility of asset status and consistency of asset management outcomes regardless of the party responsible for asset oversight.

Scope of Work:

<table>
<thead>
<tr>
<th>Task No.</th>
<th>Task Description</th>
<th>Resources</th>
<th>Approx. Duration</th>
<th>Delivery Timeframe</th>
<th>Deliverable / Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Capture of asset management requirements in Contracts.</td>
<td>Council</td>
<td>2 Months</td>
<td>Medium to Long</td>
<td>Contracts accurately and consistently address asset management requirements</td>
</tr>
<tr>
<td>2</td>
<td>Develop Guidelines for alternative Forms of asset management contracting.</td>
<td>Council</td>
<td>2 Months</td>
<td>Long</td>
<td>Asset Management Contracting Guidelines</td>
</tr>
</tbody>
</table>

Define Asset Management Handover Procedures

Description of the Initiative:

The first task under this initiative identifies the need to consider asset management objectives and outcomes in the asset handover procedures currently being developed as part of Council’s Project Delivery Toolkit initiative. Specific outcomes sought by this task will include:

- Ensuring assets delivered for Council are in accordance with relevant Standards and are capable of meeting all associated Levels of Service both at hand-over and into the future;
- Streamlining capture of asset inventory data by Council asset information systems at contract hand-over; and
- Ensuring transfer of all asset operation and maintenance requirements to Council on completion of the contract defects liability period;

The second task under this initiative is to document the procedures that will be applied at asset creation or hand-over to ensure that all assets are appropriately and consistently capitalised. These procedures will include Council business rules, linked to relevant asset accounting standards, to:

- Determine the asset materiality threshold;
- Establish rules that be applied to inform the level of asset componentisation;
- Define the cost inputs to consider when determining asset capital value; and
- Document the workflow that will be followed from creation / acquisition of the asset to recording of the asset on Council’s asset register;
The first two procedures will need to be developed in collaboration with Council staff to ensure the outcomes of these procedures serve both financial and operational objectives.

**Council Lead(s)**
Asset Planning Co-ordinator, Infrastructure Planning & Design Manager, Financial Services Manager, Co-ordinator Engineering, Project Officer Planning & Infrastructure

**Interfaces with existing Council Initiatives:**
- Project Delivery Toolkit Initiative
- As Constructed Process Mapping

**Dependencies with other Road-Map Initiatives:**
- Asset Management Process Mapping and Data Analysis: *The process steps and/or workflows developed under this initiative will be incorporated into the end-to-end process mapping under this initiative.*

**ISO 55001 Reference:**
- 8.1 Operational Planning and Control: *The organisation shall plan, implement and control the processes needed to meet requirements...*

**Potential Benefits:**
The benefits of including asset management considerations within the current Project Delivery Toolkit initiative are that capture of asset data at hand-over is streamlined and Council is not left with an administrative or operational liability post-handover.

The development of procedures for the capitalisation of assets that meet both financial and operational requirements of the business will not only standardise the capitalisation process, but improve operational efficiency. Providing a “single point of truth” of capitalised asset data eliminates data ambiguities and reduces data administration overheads. A common source of this information for both financial and operational purposes provides the opportunity for Council staff to provide inputs on asset modifications (i.e. maintenance, renewal or upgrade) that would not otherwise accurately be reflected in Council’s financial systems.

**Scope of Work:**

<table>
<thead>
<tr>
<th>Task No.</th>
<th>Task Description</th>
<th>Resources</th>
<th>Approx. Duration</th>
<th>Delivery Timeframe</th>
<th>Deliverable / Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Ensure capture of asset management requirements in existing PD Toolkit initiative.</td>
<td>Council</td>
<td>2 months</td>
<td>Short</td>
<td>PD Toolkit developed meets asset management requirements.</td>
</tr>
<tr>
<td>2</td>
<td>Document procedures for realisation and capitalisation of handed-over assets</td>
<td>Council</td>
<td>4 months</td>
<td>Short</td>
<td>Consistent approach to asset capitalisation that meets financial and operational requirements.</td>
</tr>
</tbody>
</table>
**Asset Management Planning Platform**

**Develop and Agree on a Standard Asset Management Plan Template**

**Description of the Initiative:**

The template must be flexible enough to cover the varying nature of asset “groupings” that might potentially be presented in future Asset Management Plans. It is noted that Council’s future Asset Management Plans may be precinct-based, facility-based or asset class-based.

It is understood that Council has sourced some examples of Asset Management Plan templates, including some provided by CH2M. Based on these examples and an understanding of both ISO 55000 requirements and Council’s current business context, a suitable template can be developed. This template should include sufficient annotation to guide the creation of a completed plan. With time, this annotation may include hyperlinks to relevant Council Asset Management references and/or Guidelines.

To test and refine the draft AMP template developed, Council should apply the template to a representative facility or asset class. This will give Council an appreciation of the level of effort required to develop an AMP and allow a level of fine-tuning, ahead of the whole-of-portfolio AMP roll-out. It is expected that the template will be refined to ensure that the information documented is of sufficient detail and in formats that support appropriate decision-making. Another consideration impacting detail / presentation might be the data transfer / presentation constraints of Council asset information systems.

**Council Lead(s)**

Asset Planning Co-ordinator, Asset Management Steering Team, Asset Management Working Group(s)

**Interfaces with existing Council Initiatives:**

N/A

**Dependencies with other Road-Map Initiatives:**

Asset Management Objectives: *The organisation shall establish, document and maintain asset management plan(s) to achieve the asset management objectives.*

**ISO 55001 Reference:**

6.2.2 Planning to Achieve Asset Management Objectives: *When planning how to achieve its asset management objectives, the organisation shall determine and document... actions to address risks and opportunities associated with managing the assets.*

**Potential Benefits:**

Council will develop a “standardised” Asset Management Plan template that will enable more ready assessment of needs across asset classes.

The pilot AMP, once refined, will be Council’s first ISO 55000 aligned AMP.

**Scope of Work:**

<table>
<thead>
<tr>
<th>Task No.</th>
<th>Task Description</th>
<th>Resources</th>
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</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Develop a suitable template for future Asset Management Plans</td>
<td>Council</td>
<td>2 months</td>
<td>Short</td>
<td>Draft Asset Management Plan Template</td>
</tr>
<tr>
<td>2</td>
<td>Develop a “Pilot” AMP using the template developed to test / refine the template.</td>
<td>Council</td>
<td>4 months</td>
<td>Short</td>
<td>Refined AMP Template and completed AMP</td>
</tr>
</tbody>
</table>
**Develop Corporate Asset Management Plan / State of the Assets Report (SoAR)**

**Description of the Initiative:**

In the period while Council’s SAMP and AMP program are being developed, a whole-of-portfolio document can be developed to support asset management planning. This document will consolidate available asset data in a structure consistent with ISO 55000, to provide Council as accurate a picture as possible of the status, stakeholder details, influencing factors and needs of Council’s asset-base. The resulting document may be considered a Corporate Asset Management Plan, but is likely to be more aligned to the “State of the Assets” Reports that are produced by asset owners in other non-municipal sectors.

Given the developing nature of Council’s asset knowledge base and the data that underpins it, this document will present data and make recommendations at a suitably high level. It will however, provide more detail than a consolidation of Council’s existing High-level Asset Management Plans and will be structured in accordance with the agreed Asset Management Template. It is noted that much of the information required to fill any potential gaps in the CAMP, while not formally recorded, is likely to be available from the various officers in Council with asset responsibility. In particular, the strategies currently applied to individual assets often appear to be well understood by these staff but limited documentary evidence of these strategies is available. It is suggested that some consultation with these staff be carried-out to capture and document any missing information necessary and can assist with this consultation, if required.

In parallel with development of the CAMP, Council should put in-place a program to develop and refine Asset-specific Levels of Service that align with the Asset Management Objectives defined in the SAMP. These Levels of Service will also need to be developed with due consideration of the Asset Strategies developed for the CAMP.

**Council Lead(s)**

Asset Planning Co-ordinator, Asset Management Working Group(s)

**Interfaces with existing Council Initiatives:**

Existing High-Level Asset Management Plans

**Dependencies with other Road-Map Initiatives:**

- Develop Council’s Preliminary SAMP: Defines the internal and external influences of the Asset Management System that need to be captured in the CAMP. Also documents the asset management decision-making criteria that will be employed in the CAMP.

- Develop and Agree on a Standard Asset Management Template: Will guide the structure and content of the CAMP/SoAR.

**ISO 55001 Reference:**

6.2.2 Planning to Achieve Asset Management Objectives: The organisation shall establish, document and maintain asset management plan(s) to achieve the asset management objectives. These asset management plan(s) shall be aligned with the asset management policy and the SAMP

**Potential Benefits:**

The main benefit of the CAMP or SoAR document is that it will meet Council’s asset management planning requirements in the period up until the full suite of AMPs is developed. Once the AMPs are on-line, the purpose of this report may transition to being the mechanism for providing the asset-centric components of Council’s Annual Report.

In its intended role, the CAMP/SoAR will provide Council with as comprehensive view of the status and needs of the asset portfolio as available asset information/knowledge will allow. Based on this
improved knowledge, Council will be able to make more informed operational and financial asset decisions and be more confident of the outcomes of these decisions.

Scope of Work:

<table>
<thead>
<tr>
<th>Task No.</th>
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<th>Delivery Timeframe</th>
<th>Deliverable / Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Capture and document existing asset strategies.</td>
<td>Council External Provider (optional)</td>
<td>2 months</td>
<td>Short</td>
<td>Existing asset strategies and their decision criteria</td>
</tr>
<tr>
<td>2</td>
<td>Develop Asset-specific Levels of Service</td>
<td>Council</td>
<td>12 months</td>
<td>Short</td>
<td>Asset Levels of Service</td>
</tr>
<tr>
<td>3</td>
<td>Develop State of the Assets Report (SoAR)</td>
<td>Council</td>
<td>2 months</td>
<td>Medium</td>
<td>SoAR Document</td>
</tr>
</tbody>
</table>

**Develop Asset Management Plans**

**Description of the Initiative:**

Once Council’s Asset Management Template has been refined and finalised and the Preliminary SAMP has been finalised, the individual AMPs can be developed. It is anticipated that the development of these plans will be prioritised and staged in accordance with:

- The criticality of the assets covered in each Plan;
- The relative proportion of funding required by the assets; and
- The ability of Council data and information systems supporting each asset to populate the Plans.

In this draft of the Road-Map, the scope of each AMP has not been established and as a result, the AMP development program cannot be documented. It is envisaged however, that this Road-Map Report will be updated as other Road-Map initiatives are completed to present the latest program. An early task has been identified under this initiative to develop a draft list of AMPs and their likely sequence in the AMP program, to assist with program planning. This can be done as soon as the scope of the Asset Management System has been determined and the rationale for individual AMP scopes has been finalised.

In the interim, the Corporate Asset Management Plan or State of the Assets Report will be the document that supports Council’s asset management planning from a whole-of-portfolio perspective.

**Council Lead(s)**

Asset Planning Co-ordinator, Asset Management Working Group(s)

**Interfaces with existing Council Initiatives:**

N/A

**Dependencies with other Road-Map Initiatives:**

Develop Council’s Preliminary SAMP: Defines the internal and external influences of the Asset Management System that need to be captured in the AMPs. Also documents the asset management decision-making criteria that will be employed in the AMPs.

Develop Corporate Asset Management Plan / State of the Assets Report: Defines the asset strategies that will be applied or refined in the individual AMPs.

Standard Asset System Scope: Determines the scope of assets covered in each AMP.
Develop and Agree on a Standard Asset Management Template: Prerequisite for the AMP roll-out.

ISO 55001 Reference:

6.2.2 Planning to Achieve Asset Management Objectives: The organisation shall establish, document and maintain asset management plan(s) to achieve the asset management objectives. These asset management plan(s) shall be aligned with the asset management policy and the SAMP

Potential Benefits:
Collectively the AMPs will build on and provide more transparency over the asset information provided in the CAMP/SoAR document. They will underpin asset decision-making and improve the clarity and defensibility of these decisions. They will also be an important resource not only for the reporting of asset status, but for engaging with asset stakeholders on asset strategy and levels of service, through tighter linkage of investment to asset outcomes.

Scope of Work:
In later drafts of this Road-Map, the individual Asset Management Plans, their resource requirements and delivery timeframes will be recorded in the table below:

<table>
<thead>
<tr>
<th>Task No.</th>
<th>Task Description</th>
<th>Resources</th>
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<th>Delivery Timeframe</th>
<th>Deliverable / Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Develop draft list of AMPs and their delivery timeframe</td>
<td>Council</td>
<td>1 month</td>
<td>Short</td>
<td>Preliminary AMP Program</td>
</tr>
<tr>
<td>2</td>
<td>Incremental development of AMPs</td>
<td>Council</td>
<td>Short to Medium</td>
<td>Completed AMPs</td>
<td></td>
</tr>
</tbody>
</table>

3.2.5 Support

Develop Asset Management Competency Framework and Plan

Description of the Initiative:
It is understood that most Council staff have a role statement or Position Description, but these will need to be reviewed to reflect any new or changed functions, tasks and decision-making introduced by the Asset Management System. This initiative defines the procedures Council will employ to assess existing Council staff with a role under the Asset Management System against the competencies required to fulfil the roles and accountabilities identified in the Develop Asset Management Roles and Accountabilities Road-Map initiative.

The first step of this initiative will be to determine minimum competencies necessary to carry-out specific asset management roles. It is recommended that Council utilise the Institute of Asset Management (IAM) Competences Framework as a reference for this task. The IAM Framework is structured to cover seven key asset management roles, against which a number of competence units are assigned. Each competence unit is further subdivided into a small set of competence elements, which are at a level of detail that would generally be found in a Position description role statement. The Framework also provides an indicative list of knowledge and understanding that might be needed to meet competence element requirements, which will be helpful in planning any future asset management training requirements.

Once these competencies are understood, they can be mapped to the staff in Council that will undertake the asset management roles. Any competence gaps can then be readily identified and a plan can be developed to address these gaps. The second volume of the IAM Competences Framework documentation provides guidance on a suitable approach which can be readily modified to suit Council’s requirements and existing Council human resource procedures. The resulting approach should be documented in an Asset Management Competence Development Plan.
Council Lead(s)

Asset Planning Co-ordinator, Human Resources Manager, Asset Management Steering Team

Interfaces with existing Council Initiatives:

Existing Council HR Policies and Procedures

Dependencies with other Road-Map Initiatives:

Asset Management Process Mapping and Data Analysis: The Process Maps developed will assist Council in understanding and assigning asset management roles within Council’s Asset Management System.

ISO 55001 Reference:

7.2 Competence: The organisation shall:

- determine the necessary competence of person(s) doing work under its control that affects its asset performance, asset management performance and asset management system performance;
- ensure that these persons are competent on the basis of appropriate education, training, or experience;
- where applicable, take actions to acquire the necessary competence, and evaluate the effectiveness of the actions taken;
- retain appropriate documented information as evidence of competence;
- periodically review current and future competency needs and requirements.

Potential Benefits:

The assessment of staff competence in asset management and the development of a plan to address any competence shortfalls will ensure that Council staff are adequately trained and knowledgeable to ensure the effective application of Council’s Asset Management System. In addition, the mapping of staff roles to specific asset management competences will give staff more certainty of their contribution to the asset management system.

Scope of Work:

<table>
<thead>
<tr>
<th>Task No.</th>
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<th>Deliverable / Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Determine minimum competencies for AMS roles.</td>
<td>Council</td>
<td>1 month</td>
<td>Medium</td>
<td>AM Competency Framework</td>
</tr>
<tr>
<td>2</td>
<td>Map competencies of staff assigned to AMS roles (including position description review).</td>
<td>Council</td>
<td>1 month</td>
<td>Medium</td>
<td>Clarity of staff roles</td>
</tr>
<tr>
<td>3</td>
<td>Undertake a gap analysis of staff competencies.</td>
<td>Council</td>
<td>1 month</td>
<td>Medium</td>
<td>Staff competence improvement needs understood.</td>
</tr>
<tr>
<td>4</td>
<td>Create an Asset Management Competence Development Plan</td>
<td>Council</td>
<td>3 months</td>
<td>Medium</td>
<td>Plan to close any competence “gaps”</td>
</tr>
</tbody>
</table>
Asset Management Awareness

Description of the Initiative:
This initiative covers the production and delivery of awareness raising materials that support Council’s Asset Management System. At the current stage of Council’s Asset Management System development, limited material has been scoped, but a focus will be needed around:

- The Asset Management Policy;
- The benefits of Council’s Asset Management System;
- The work activities of Council’s Asset Management System and how staff contribute to their effectiveness; and
- The methods of assessing and implications of not complying with Asset Management System compliance.

In the first instance, a task to develop an asset management induction ‘pack’ was identified during the development workshops. This will provide all staff who have a role in Council’s Asset Management System and those that might be influenced by it, with a base level understanding of general asset management principles, Council’s Asset Management Policy, the ISO 55000 Standard and Council’s Asset Management System. This pack can be developed electronically and sourced from Council’s intranet site.

Further materials will be developed as other Road-Map initiatives are closed-out and Council’s Asset Management System becomes more mature. This section of the report should be updated as these are materials are identified and scoped.

Council Lead(s)
Asset Planning Co-ordinator, Human Resources Manager, Asset Management Steering Team

Interfaces with existing Council Initiatives:
Existing Council communications protocols and presentation standards.

Dependencies with other Road-Map Initiatives:
Develop the Asset Management Communications Framework: Defines the Framework under which the Asset Management awareness materials will be delivered.

Develop Asset Management Competency Framework and Plan: The Asset Management Competence Plan may identify awareness raising opportunities, to promote staff role clarity or where there is a widespread knowledge shortfall in a specific area identified through the staff competence assessment process.

ISO 55001 Reference:
7.3 Awareness: Persons doing work under the organization’s control... shall be aware of: the asset management policy; their contribution to the effectiveness of the asset management system, including the benefits of improved asset management performance; their work activities, the associated risks and opportunities and how they relate to each other; and the implications of not conforming to the asset management system requirements.
Potential Benefits:
Improved staff understanding of asset management principles in-general and the details of Council’s Asset Management System in-particular will enable them to work more effectively on tasks related to the System. This knowledge, if effectively developed, should build staff buy-in through a greater appreciation of their contribution to Council’s stated Asset Management outcomes and their associated benefits.

Scope of Work:

<table>
<thead>
<tr>
<th>Task No.</th>
<th>Task Description</th>
<th>Resources</th>
<th>Approx. Duration</th>
<th>Delivery Timeframe</th>
<th>Deliverable / Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Develop asset management induction pack.</td>
<td>Council</td>
<td>2 months</td>
<td>Medium</td>
<td>Asset Management Induction Pack</td>
</tr>
<tr>
<td>2</td>
<td>Develop staff AM training materials</td>
<td>Council</td>
<td>3 months</td>
<td>Medium</td>
<td>Staff AM Training Materials</td>
</tr>
</tbody>
</table>

Asset Information Improvement

*Asset Management Process Mapping and Data Analysis*

Description of the Initiative:
This initiative builds on the process mapping already carried out by Council, to give a holistic view of Council’s Asset Management System, from a process perspective.

The suggested output for this initiative is a documented end-to-end workflow for each asset management process, summarised in the form of a “Swim-lane” diagram. The swim-lane diagram is a form of Process Map, showing process steps within “lanes” that define the business unit that “owns” that step. The current process maps generated by Council for the As-Constructed and LDCC Incoming Request processes are examples of swim lane diagrams.

Key Asset Management workflows that would be mapped include:

- Asset Investment Planning;
- Asset Service Level Determination and Review;
- Asset Condition and Performance Assessment;
- Asset Handover and Capitalisation;
- Work Order Management (creation, delivery, close-out); and
- Asset Disposal.

The mapping and documentation of Asset Management System workflows / processes should be carried-out incrementally, as information from other Road-Map initiatives come to-hand and where there is a good business case to resource the mapping.

CH2M notes that Council’s Asset Management information system provider (Technology 1) may have developed some process maps of specific Asset Management workflows for the purposes of scoping and delivering the system. It may be worthwhile to enquire if any such mapping has been done and if so, whether these maps can be provided to Council.
Details of each of the process steps in the swim lane diagram would be provided in an accompanying workflow document, including:

- Process Step “owners”;
- Key decisions made;
- Process step inputs / outputs; and
- Tools / resources required to support the process step.

With the benefit of the process maps developed, Council will be in a position to determine the asset data required to support the Asset Management System. The data requirements determined may either be documented along with their associated workflows or as a separate document.

**Council Lead(s)**

Asset Planning Co-ordinator, Financial Services Manager, Systems Officer, Asset Management Working Group(s)

**Interfaces with existing Council Initiatives:**

As Constructed Process Mapping
Local Disaster Coordination Centre Incoming Request Process

**Dependencies with other Road-Map Initiatives:**


Define Asset Management Handover Procedures: *Needs to reflect the output of the procedures developed.*

Develop Asset Management Roles and Responsibilities: *Roles and responsibilities will be linked to the process steps mapped and the process maps will become a resource for staff competency assessment in the future.*

Develop Asset Management Information Strategy: *The data requirements captured under this initiative will provide the data “desired state” against which, the current status of Council’s asset data will be assessed.*

**ISO 55001 References:**

8.1 Operational Planning and Control: *The organisation shall plan, implement and control the processes needed to meet requirements…*

7.3 Awareness: *Persons doing work under the organisation’s control, who can have an impact on the achievement of the asset management objectives, shall be aware of… their work activities… and how they relate to each other.*

7.5 Information Requirements: *The organisation shall determine its information requirements to support its assets, asset management, asset management system and the achievement of its organisational objectives.*

**Potential Benefits:**

Comprehensive documentation of the workflows and processes that support Council’s Asset Management System will increase staff understanding of both individual workflow activities and their interdependencies. The resulting process maps also provide a foundation for assessing the data needs of the Asset Management System.

Identification of the asset data requirements of the Asset Management System will allow Council to determine whether existing asset data is sufficient and where this in not the case, to plan for improvement.
Scope of Work:

<table>
<thead>
<tr>
<th>Task No.</th>
<th>Task Description</th>
<th>Resources</th>
<th>Approx. Duration</th>
<th>Delivery Timeframe</th>
<th>Deliverable / Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Map the workflows supporting the Asset Management System</td>
<td>Council</td>
<td>6 months</td>
<td>(staged)</td>
<td>AMS Process Maps</td>
</tr>
<tr>
<td>2</td>
<td>Determine the data requirements for the workflows mapped.</td>
<td>Council</td>
<td>6 months</td>
<td>Medium</td>
<td>Asset Management System data requirements</td>
</tr>
</tbody>
</table>

**Develop Asset Management Information Strategy**

**Description of the Initiative:**

The purpose of this initiative is to review Council’s existing asset data and assess how well it meets the needs of Council’s proposed Asset Management System. Completeness, quality, structure and accessibility will be key areas of focus for the review. Once the status of Council’s asset data is well understood, a staged improvement plan can be developed to improve, augment and maintain the quality of the data, as necessary.

The first task under this initiative is the assessment of the current state of Council’s asset data. This will require:

- the identification of all potential datasets, their contents and formats;
- recording the information system that the data is stored in;
- assessment of the completeness / quality of the data; and
- determination of how accessible the data is to staff who need access under the Asset Management System;

Once this is done, the available asset data can be compared against the requirements of the Asset Management System, as determined in the Asset Management Process Mapping and Data Analysis Road-Map initiative. Any shortfall identified, which includes issues of data quality or accessibility, should be documented and a strategy developed to address these shortfalls.

The Asset Management Information Strategy should cover:

- New asset data to be collected;
- Existing asset data to be augmented or “cleansed”;
- Redefinition of existing data structures to aid analysis or reporting – including the asset hierarchy / componentisation;
- Data to be consolidated and/or migrated from one system to another;
- Documentation of asset information data Standards;
- Data review/validation measures to be implemented to achieve the data Standards documented; and
- Measures to be put in-place to improve data access.

The Asset Management Information Strategy should incorporate as an Appendix or be accompanied by a regularly updated Asset Management Data map, showing the current status of asset datasets, attributes, formats and source information system. This map will not only show the current status of Council’s Asset Management data improvement program, but will be a valuable reference for Council staff seeking asset data throughout this program.
Council Lead(s)
Asset Planning Co-ordinator, Financial Services Manager, Systems Officer, Asset Management Working Group(s)

Interfaces with existing Council Initiatives:
Mobility Program: Will continue to be a valuable mechanism for capture of asset data and requirements.

Dependencies with other Road-Map Initiatives:
Asset Management Process Mapping and Data Analysis: Defines the “desired state” for Council’s Asset Management data

ISO 55001 Reference:
7.5 Information Requirements: The organisation shall determine its information requirements to support its assets, asset management, asset management system and the achievement of its organisational objectives.

Potential Benefits:
Development of Council’s Asset Management Information Strategy will allow Council to understand the nature of the data required to sustain an ISO 55000-aligned Asset Management System. The strategy will also ensure alignment with future strategic asset management system data requirements. In addition, it will provide a staged implementation plan for the establishment of this data in the most appropriate format, stored in the most appropriate information system.

Scope of Work:

<table>
<thead>
<tr>
<th>Task No.</th>
<th>Task Description</th>
<th>Resources</th>
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<th>Delivery Timeframe</th>
<th>Deliverable / Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Review existing asset hierarchy</td>
<td>Council</td>
<td>2 months</td>
<td>Short</td>
<td>Revised asset hierarchy</td>
</tr>
<tr>
<td>2</td>
<td>Develop or revise data standards</td>
<td>Council</td>
<td>2 months</td>
<td>Short</td>
<td>Agreed asset information data Standards</td>
</tr>
<tr>
<td>3</td>
<td>Develop information improvement program</td>
<td>Council</td>
<td>3 months</td>
<td>Short</td>
<td>Comprehensive and high-quality asset data to support the Asset Management System</td>
</tr>
</tbody>
</table>

Asset Management Document Control

Description of the Initiative:
The new Asset Management System will require the development of a number of documents that will need to be controlled, from both a quality control perspective and to ensure good governance. This initiative will formalise the mechanisms of control that will apply to the following Asset Management System documents, as a minimum:

- The Asset Management Policy;
- The (Preliminary) SAMP;
- The Corporate Asset Management Plan (CAMP);
- The Individual Asset Management Plans;
- The Operational Plans showing the tactical output of the Asset Management Plans;
- The Asset Management Competency Framework and Plan; and
- The Asset Management Information Strategy.

Control mechanisms will cover the following activities related to the documents:

a. Distribution, access, retrieval and use;
b. Storage and preservation, including preservation of legibility;
c. Control of changes (i.e. Version control); and
d. Retention and disposal.

It is anticipated that Council will have the necessary procedures and protocols in-place and that the Asset Management System documentation will need to be recognised in accordance with these procedures. This may require either revision of the procedures/protocols themselves or modification of the documents to comply (i.e. Inclusion of an approvals page on key documents). Use of Council’s current Document Management System (ECM), and the rules associated with this system, will also apply to Asset Management System support documentation.

Council Lead(s)

Asset Planning Co-ordinator, Asset Management Steering Team

Interfaces with existing Council Initiatives:

- Existing document control mechanisms

Dependencies with other Road-Map Initiatives:

- Develop Council’s Preliminary SAMP: Source document for control.
- Develop Asset Management Plans: Source documents for control.
- Develop Asset Management Competency Framework and Plan: Source document for control.
- Develop Asset Management Information Strategy: Source document for control.

ISO 55001 Reference:

7.6.3 Control of Documented Information: Documented information required by the asset management system... shall be controlled to ensure: it is available and suitable for use, where and when it is needed; and it is adequately protected (e.g. from loss of confidentiality, improper use, or loss of integrity).

Potential Benefits:

Control of Asset Management documentation will improve ensure that all stakeholders with a need to reference key documents will have access. It will also give these stakeholders confidence that the documents being referenced have been appropriately reviewed/endorsed and that they are the most current documents available.
Scope of Work:

<table>
<thead>
<tr>
<th>Task No.</th>
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<th>Deliverable / Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Determine asset management document control requirements</td>
<td>Council</td>
<td>1 month</td>
<td>Short / Medium</td>
<td>AMS document control needs understood.</td>
</tr>
<tr>
<td>2</td>
<td>Incorporate procedures developed into existing corporate governance / document control procedures</td>
<td>Council</td>
<td>1 month</td>
<td>Medium</td>
<td>Revised document control procedures aligned to AMS requirements</td>
</tr>
</tbody>
</table>

3.2.6 Operation

Asset Management Plan to Delivery

Description of the Initiative:

This initiative documents the end-to-end workflow commencing from Asset Management Plan creation and concluding at final asset investment delivery. The final document will detail what programmatic data is presented in the AMPs, how this information contributes to planned/prioritised programmes of asset-oriented work and how these programmes are reviewed / approved.

Typically this document would also define the level of detail required for programmed activity data at various timeframes prior to delivery, with more detail and accuracy required as activities near their delivery date. The processes of activity step-in and approval at each of these timing “gateways” should also be documented.

Council Lead(s)

Asset Planning Co-ordinator, Financial Services Manager, Asset Management Steering Team

Interfaces with existing Council Initiatives:

Existing Council budgeting processes

Dependencies with other Road-Map Initiatives:

Develop Asset Investment Planning Framework: Defines the procedures, support tools and decision-making related to the AMP to Budget workflow.

Asset Management Process Mapping and Data Analysis: Will document the workflow, processes and tools related to the AMP to Budget workflow.

ISO 55001 References:

8.1 Operational Planning and Control: Keeping documented information to the extent necessary to have confidence and evidence that the processes have been carried out as planned.

5.1 Leadership and Commitment: Ensuring the integration of the asset management system requirements into the organisation’s business processes.
Potential Benefits:
Individual Asset Management Plan “owners”, Council Management and the end users of these Plans will gain a greater appreciation of how the AMPs contribute to annual adopted budgets and financial forecasts, and the process applied to achieve annual budget approval. This knowledge should streamline AMP development and reduce the number of iterations required in the workflow to gain approval.

Scope of Work:

<table>
<thead>
<tr>
<th>Task No.</th>
<th>Task Description</th>
<th>Resources</th>
<th>Approx. Duration</th>
<th>Delivery Timeframe</th>
<th>Deliverable / Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Document the workflow from Asset Management Plan to long term financial forecasting and approved annual budget.</td>
<td>Council</td>
<td>2 months</td>
<td>Medium</td>
<td>Documented AMP to Budget workflow.</td>
</tr>
</tbody>
</table>

Management of Change

Description of the Initiative:
In contrast to the Change Management Strategy task under the Road-Map which has a human resources focus, the Management of Change initiative focuses on changes which might have an impact on asset lives, existing asset management approaches applied or asset service levels. These changes may include legislative changes, outsourcing of one or many asset classes, significant changes in stakeholder requirements or new external reporting requirements.

The first step in this initiative is to determine the possible changes that may pose a risk to achieving asset management objectives or that might impact the effectiveness of existing asset management approaches. Typically this would be carried-out on an asset class basis and would result in comprehensive changes by asset class as well as their associated consequence and likelihood (i.e. their risk). A key outcome of this task will be the identification of factors that initiate or influence the scale of the changes identified.

Once these risks have been identified and verified, appropriate mitigation measures can be developed to manage them. These measures may include: collection of information or initiation of research to provide early warning of changes; modification of existing asset management processes to improve resilience to change; development of tools to improve forecasting capability; or review of asset service levels to provide change “headroom”.

Council Lead(s)
Asset Planning Co-ordinator, Human Resources Manager, Asset Management Steering Team

Interfaces with existing Council Initiatives:
Existing Council risk management procedures and/or processes

Dependencies with other Road-Map Initiatives:
Develop Risk Assessment Methodology and Framework: Defines the approach to be applied to assessing risks related to the identified changes.

Develop the Asset Management System Change Management Strategy: Informs specific communication measures and messages related to asset-focused change management.

ISO 55001 Reference:
8.2 Management of Change: Risks associated with any planned change, permanent or temporary that can have an impact on achieving the asset management objectives, shall be assessed before the change is implemented.
Potential Benefits:
Council’s Asset Management System will be more resilient to change and key documents within this system will present the measures developed to plan for and respond to all changes identified.

Scope of Work:

<table>
<thead>
<tr>
<th>Task No.</th>
<th>Task Description</th>
<th>Resources</th>
<th>Approx. Duration</th>
<th>Delivery Timeframe</th>
<th>Deliverable / Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Identify possible changes, their influencing factors and associated risks, by asset class.</td>
<td>Council</td>
<td>3 months</td>
<td>Medium</td>
<td>Comprehensive list of possible changes, by asset class.</td>
</tr>
<tr>
<td>2</td>
<td>Develop measures to mitigate the risks of changes identified.</td>
<td>Council</td>
<td>2 months</td>
<td>Medium</td>
<td>Identified measures to mitigate risks of change.</td>
</tr>
</tbody>
</table>

Control of Outsourced Activities

Description of the Initiative:
This initiative formalises the rules that will be applied to outsourcing the management of Council assets and/or the procurement of external parties to deliver asset management functions on Council’s behalf. It will define the risks and opportunities related to outsourcing these services to:

- Identify critical assets and asset management functions that should remain under Council control;
- Determine the circumstances under which management of less critical assets and asset management functions could be outsourced; and
- Identify the most appropriate Form of Contract for procurement of asset management or asset management functions.

Council Lead(s)
Noosa Leadership Team, Governance Advisor, Procurement and Fleet Manager

Interfaces with existing Council Initiatives:
Existing Council Contract Administration processes and procedures.

Dependencies with other Road-Map Initiatives:
Develop the Asset Management System Change Management Strategy: Informs specific communication measures and messages related to asset-focused change management.

ISO 55001 Reference:
8.2 Outsourcing: The organisation shall ensure that outsourced processes and activities are controlled... ... and integrated into the organisation’s asset management system.

Potential Benefits:
The Asset Management Strategic Sourcing Study will provide better understanding of the risks and opportunities related to outsourcing the management of specific assets or asset management functions. It will also provide clear guidance on the considerations to be made and approach to be employed when outsourcing these services.
Scope of Work:

<table>
<thead>
<tr>
<th>Task No.</th>
<th>Task Description</th>
<th>Resources</th>
<th>Approx. Duration</th>
<th>Delivery Timeframe</th>
<th>Deliverable / Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Develop an Asset Management Strategic Sourcing Strategy</td>
<td>Council</td>
<td>2 months</td>
<td>Medium</td>
<td>AM Strategic Sourcing Strategy</td>
</tr>
</tbody>
</table>

3.2.7 Performance Evaluation

Quality Management Plan

Description of the Initiative:

This initiative covers the development and documentation of a Quality Management Plan for Council’s Asset Management System. The Plan will provide guidance on the monitoring, reporting, management review and approval regime that will be put in-place to:

- Assure the suitability, timeliness and quality of asset inventory, condition and performance data;
- Track achievement of financial and non-financial outcomes of the Asset Management System; and
- Drive continual improvement of the Asset Management System, in terms of both asset decision-support and achievement of Asset Management objectives.

The regime documented in the Quality Management Plan should be tightly integrated with Council’s existing Quality Management procedures, where possible and applicable. It should also leverage Council’s Internal Audit function at regular intervals for general review and appropriate levels of issue escalation for specific non-conformances. For this reason, development of the Asset Management System Quality Management Plan should be preceded by a review of these existing functions against the requirements of the Asset Management System.

Council Lead(s)

Asset Planning Co-ordinator, Governance Advisor, Asset Management Steering Team

Interfaces with existing Council Initiatives:

- Existing Council Quality Management procedures
- Existing Council Internal Audit procedures

Dependencies with other Road-Map Initiatives:


  *Develop Asset Information Management Strategy: Standards and data validation approaches developed under this initiative need to be captured in the Asset Management System Quality Management Plan.*

ISO 55001 Reference:

9.1 Monitoring, Measurement, Analysis and Evaluation: The organisation shall determine what needs to be monitored and measured... ... to evaluate and report on: asset performance, asset management performance; and the effectiveness of the Asset Management System.

10.1 Non-conformity and Corrective Action: The organisation shall... ...react to the nonconformity or incident, and... ... evaluate the need for action to eliminate the causes of the nonconformity or incident.

10.2 Preventive Action: The organisation shall establish processes to proactively identify potential failures in asset performance and evaluate the need for preventive action.

Potential Benefits:

Council will have confidence that the Asset Management System is delivering against stated Asset Management objectives. The documented regime will provide an audit trail that demonstrates the effectiveness of the Asset Management System. This regime will also enable continual improvement of the Asset Management System as Council’s Asset Management capability improves.

Scope of Work:

<table>
<thead>
<tr>
<th>Task No.</th>
<th>Task Description</th>
<th>Resources</th>
<th>Approx. Duration</th>
<th>Delivery Timeframe</th>
<th>Deliverable / Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Investigate integration of AMS performance management requirements in existing Council quality management and internal audit plan</td>
<td>Council</td>
<td>2 months</td>
<td>Medium</td>
<td>Required amendments to existing Plans or functions.</td>
</tr>
<tr>
<td>2</td>
<td>Develop Asset Management System Quality Management Plan</td>
<td>Council</td>
<td>2 months</td>
<td>Medium</td>
<td>Asset Management System Quality Management Plan</td>
</tr>
</tbody>
</table>

3.2.8 Improvement

Failure / Root Cause Analysis

Description of the Initiative:

This initiative seeks to identify the mechanisms of asset failure and implement processes to ensure these failures can be appropriately and cost-effectively responded to.

The initial task of this initiative is to gather a comprehensive baseline understanding of the failure mechanisms associated with the full range of Council assets and their most likely root causes. As there is not a significant body of asset data to draw from, it is anticipated that the assessment will require consultation with Council’s operational staff, to consolidate their collective knowledge. The most effective mechanism for this consultation would appear to be the current Mobility Project.

To capture failure / root cause data sustainably, regular reviews should be incorporated into Council’s existing maintenance planning workflows. Specific objectives should include: capture of failure indicators during asset inspections/servicing and inclusion of data fields in corrective maintenance job plans to identify likely root causes.

The final task in this initiative is the implementation of an information “feedback loop” to ensure that systemic defects identified during existing capital works defects liability inspections initiate a review of design/performance standards and/or flag a an monitoring mechanism for maintenance post-handover. It is anticipated that this task will result in minor amendments to existing Contract closure procedures.
Council Lead(s)

Asset Planning Co-ordinator, Infrastructure Planning & Design Manager, Civil Operations Manager, Manager Procurement/Fleet, Design Co-ordinator, Asset Management Working Group(s)

Interfaces with existing Council Initiatives:

Existing Council Internal Audit plan
Council Mobility Project (as a data capture mechanism)
Existing Council work management system (asset maintenance)
Existing Council Project review procedures

Dependencies with other Road-Map Initiatives:


ISO 55001 Reference:

10.3 Continual Improvement: *The organisation shall continually improve the suitability, adequacy and effectiveness of its asset management and the asset management system.*

Potential Benefits:

Council will have an improved understanding of the mechanisms of failure for individual assets and the latent asset management liabilities of assets delivered under larger capital projects. It will also be better equipped to predict and respond to these failures as a result of the review processes implemented.

Scope of Work:

<table>
<thead>
<tr>
<th>Task No.</th>
<th>Task Description</th>
<th>Resources</th>
<th>Approx. Duration</th>
<th>Delivery Timeframe</th>
<th>Deliverable / Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Capture and documentation of routine asset failures</td>
<td>Council</td>
<td>24 months</td>
<td>Short/ Medium</td>
<td>Database of routine asset failures and the factors that influence them</td>
</tr>
<tr>
<td>2</td>
<td>Implement process of routine failure review in work management system</td>
<td>Council</td>
<td>6 months</td>
<td>Medium</td>
<td>Failure review process embedded.</td>
</tr>
<tr>
<td>3</td>
<td>Implement a process of post-delivery review for larger capital projects (including revision of Standards and tender specification documents if required).</td>
<td>Council</td>
<td>6 months</td>
<td>Medium</td>
<td>Project review process refined.</td>
</tr>
</tbody>
</table>
Initial Council Priorities

A draft of this report was provided to Council in June 2016 for feedback and this report reflects the comments and suggestions offered. In addition to commentary on the Report Content, Council provided more specific feedback on current priorities, based on the holistic improvement program presented in the Draft Road-Map Report. These priorities have been presented in a Briefing Note to Council, tabled in July 2016.

Council has identified five key priorities for the Road-Map, as:

1. Raising awareness of Councils’ Asset Management System and the principles that underpin it;
2. Understanding the Organisation and its Context;
3. Development of Council’s Asset Management System;
4. Improving Council’s ability to specify appropriate preventative actions;
5. Ensuring appropriate resourcing for Asset Management System development an ongoing operation.

In consideration of these five priorities, Council has earmarked four Road-Map tasks, which will underpin Council’s Asset Management capability improvement. These are:

1. The development of a Strategic Asset Management Plan;
2. The creation of an Asset Management Information Strategy;
3. The development of a State of the Assets pro-forma and report; and
4. The development of an Asset Management Plan pro-forma and creation of a number of AMPs under this pro-forma.

The priorities in the previous section of this report and the Gantt chart presented in Appendix A of this Report have been amended to reflect these priorities and task staging.
Next Steps

Based on the information provided in this report, it is anticipated that Council will continue to:

- Assess the task timings, interdependencies and resource requirements against other Council activities;
- Amend the Road-Map “programme” and resource allocations, based on the assessment detailed above; and
- Roll-out of the Road-Map programme, as Council priorities and resources allow.

It is expected that the programme will be reviewed regularly during its implementation, to address changes in priority and resource availability issues that may come up from time to time. Each task delivered may also influence “downstream” tasks, both in terms of scope and timing.

Given the likelihood of change and the need for task continuity, it is highly recommended that the Road-Map programme is managed by a single person in Council that understands the ISO 55000 Framework. This Programme Manager, with the support of the Asset Management Steering Team and to-be-established Asset Management Working Group(s) will be able to coordinate the task to deliver maximise benefits and ensure ongoing progress to align with the Standard.

CH2M has enjoyed working with Council to develop this Road-Map and would welcome the opportunity to support Council and its nominated Programme Manager in delivering the Programme or providing advice on the ISO 55000 Standard.
Appendix A
Asset Management Road-Map: Indicative GANTT Chart
Appendix B

Summary of Road-Map Initiatives
<table>
<thead>
<tr>
<th>Task No.</th>
<th>Task Description</th>
<th>Sub-Task No.</th>
<th>Sub-task Description</th>
<th>Linked RoadMap Tasks</th>
<th>Resources</th>
<th>Council Leads</th>
<th>Approx. Duration</th>
<th>Delivery Timing</th>
<th>Deliverable / Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Develop the Improvement RoadMap and Report</td>
<td>1</td>
<td>Complete the Asset Management Improvement RoadMap for Noosa Council</td>
<td>CH2M</td>
<td>Asset Planning Coordinator</td>
<td>1 month</td>
<td>Short</td>
<td>Improvement RoadMap</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>2</td>
<td>Draft and finalise Asset Management Improvement RoadMap Report</td>
<td>CH2M</td>
<td>Asset Planning Coordinator</td>
<td>2 weeks</td>
<td>Short</td>
<td>Improvement RoadMap Report</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Refine Asset Management Governance Arrangements</td>
<td>1</td>
<td>Develop draft governance structure for consideration / refinement by Council</td>
<td>Council</td>
<td>Asset Planning Coordinator, Asset Management Steering Team</td>
<td>2 weeks</td>
<td>Short</td>
<td>Draft Governance Structure Proposal</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>2</td>
<td>Refine, seek approval of and institutionalise proposed structure</td>
<td>Council</td>
<td>Asset Planning Coordinator, Asset Management Steering Team, NSC Management Team</td>
<td>1 month</td>
<td>Short</td>
<td>Agreed Governance Structure and Responsibility Matrix Governance players assigned and active</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Develop the Asset Management Change Management Strategy</td>
<td>1</td>
<td>Engage with Council’s HR Branch to establish an appropriate change management approach.</td>
<td>Council</td>
<td>Asset Planning Coordinator</td>
<td>1 month</td>
<td>Short</td>
<td>Agreed change management approach for the asset management system</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>2</td>
<td>Develop and/or integrate any necessary change management documentation and protocols.</td>
<td>Council</td>
<td>Asset Planning Coordinator, Human Resources Manager</td>
<td>3 months</td>
<td>Medium</td>
<td>Existing documents modified or new documents developed to support AMS change.</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Develop the Asset Management Communications Framework</td>
<td>1</td>
<td>Develop draft Communications Framework for Internal stakeholders</td>
<td>Council</td>
<td>Community Engagement Manager</td>
<td>2 weeks</td>
<td>Short</td>
<td>Draft Communications Framework (internal)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>2</td>
<td>Refine, seek approval of and institutionalise Communications Framework (internal)</td>
<td>Council</td>
<td>Community Engagement Manager, Asset Management Steering Team</td>
<td>1 month</td>
<td>Short</td>
<td>Agreed Communications Framework (internal)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>3</td>
<td>Develop draft Communications Framework for external stakeholders</td>
<td>Council</td>
<td>Community Engagement Manager, Asset Management Steering Team</td>
<td>1 month</td>
<td>Medium</td>
<td>Draft Communications Framework (external)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>4</td>
<td>Refine, seek approval of and institutionalise Communications Framework (external)</td>
<td>Council</td>
<td>Community Engagement Manager, Asset Management Steering Team</td>
<td>3 months</td>
<td>Medium</td>
<td>Agreed Communications Framework (external)</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Asset Management System Scope</td>
<td>1</td>
<td>Agree scope of assets covered in Asset Management System</td>
<td>Council</td>
<td>Asset Planning Coordinator, Asset Management Steering Team</td>
<td>2 weeks</td>
<td>Short</td>
<td>Agreed list of assets within the scope of the Asset Management System.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>2</td>
<td>Develop a “block diagram” showing the elements of Council’s AMS and their connectivity to other Council functions / Management Systems.</td>
<td>External Support Council</td>
<td>Asset Planning Coordinator, Asset Management Steering Team</td>
<td>2 weeks</td>
<td>Short</td>
<td>Block Diagram of Council’s AMS</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>3</td>
<td>Document rationale for Asset Management Plan scopes and priorities</td>
<td>Council</td>
<td>Asset Planning Coordinator, Asset Management Steering Team</td>
<td>1 month</td>
<td>Short</td>
<td>Rationale for AMP scopes, provided in SAMP.</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Environmental Scan</td>
<td>1</td>
<td>Data gathering for PESTLE / SWOT analysis (optional)</td>
<td>Council</td>
<td>Executive Manager, Asset Planning Coordinator</td>
<td>1 month</td>
<td>Short</td>
<td>Supporting data for the PESTLE / SWOT Workshop</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>2</td>
<td>1 day PESTLE and SWOT Analysis Workshop (optional)</td>
<td>Council</td>
<td>Executive Manager, Asset Planning Coordinator</td>
<td>1 week</td>
<td>Short</td>
<td>PESTLE and SWOT Analysis Report</td>
<td></td>
</tr>
<tr>
<td>Task No.</td>
<td>Task Description</td>
<td>Sub-task No.</td>
<td>Sub-tasks Description</td>
<td>Linked RoadMap Tasks</td>
<td>Resources</td>
<td>Council Leads</td>
<td>Approx. Duration</td>
<td>Delivery Timing</td>
<td>Deliverable / Outcome</td>
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</tr>
<tr>
<td>2</td>
<td>Consulate current stakeholder information.</td>
<td>7.1</td>
<td>Council</td>
<td>Asset Planning Coordinator, Asset Management Steering Team, Asset Management Working Group(s)</td>
<td>2 months</td>
<td>Short</td>
<td>A consolidated knowledge-base of stakeholder information</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Analysis of / reporting on gathered stakeholder information</td>
<td>7.2</td>
<td>Council External Provider</td>
<td>Asset Planning Coordinator, Asset Management Steering Team, Asset Management Working Group(s)</td>
<td>1 month</td>
<td>Short</td>
<td>Asset Stakeholder Report / Stakeholder Section for CAMP</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Asset Management Objectives (Levels of Service)</td>
<td>1</td>
<td>Document currently available Levels of Service</td>
<td></td>
<td>Council</td>
<td>Asset Planning Coordinator, Asset Management Steering Team, Asset Management Working Group(s)</td>
<td>1 month</td>
<td>Short</td>
<td>A list of current Levels of Service and the assets they relate to.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2</td>
<td>Develop Level of Service Framework</td>
<td>6.3, 11.1</td>
<td>Council External Support</td>
<td>Asset Planning Coordinator, Asset Management Steering Team, Asset Management Working Group(s)</td>
<td>6 months</td>
<td>Medium</td>
<td>A comprehensive Framework of Asset Service Levels that provide transparent “line-of-sight”</td>
</tr>
<tr>
<td>9</td>
<td>Asset Management Decision-Making</td>
<td>1</td>
<td>Review and refine as necessary, current “8-point score” approach for asset management purposes.</td>
<td></td>
<td>Council</td>
<td>Asset Planning Coordinator</td>
<td>1 month</td>
<td>Medium</td>
<td>Use of “8-point score” approach as an asset management decision-tool.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2</td>
<td>Develop asset management decision-making criteria for individual Asset Management Plans</td>
<td>7.3</td>
<td>Council External Provider</td>
<td>Asset Planning Coordinator, Asset Management Steering Team, Asset Management Working Group(s)</td>
<td>2 months</td>
<td>Short</td>
<td>Documented asset management decision-making criteria</td>
</tr>
<tr>
<td>10</td>
<td>Develop Council’s Preliminary SAMP</td>
<td>1</td>
<td>Develop a SAMP Template for Council</td>
<td></td>
<td>Council External Provider</td>
<td>Asset Planning Coordinator, Asset Management Steering Team, Asset Management Working Group(s)</td>
<td>1 month</td>
<td>Short</td>
<td>SAMP Template.</td>
</tr>
<tr>
<td>12</td>
<td>Develop Asset Management Roles and Responsibilities</td>
<td>1</td>
<td>Review of existing responsibility matrices.</td>
<td></td>
<td>Council</td>
<td>Asset Planning Coordinator, Human Resources Manager</td>
<td>2 months</td>
<td>Medium</td>
<td>Understanding of current responsibilities.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2</td>
<td>Development of a comprehensive RACI Chart for Council’s Asset Management System.</td>
<td>12.1</td>
<td>Council</td>
<td>Asset Planning Coordinator, Human Resources Manager</td>
<td>3 months</td>
<td>Medium</td>
<td>RACI Charts for the Asset Management System.</td>
</tr>
<tr>
<td>Task No.</td>
<td>Task Description</td>
<td>Sub-Task No.</td>
<td>Sub-task Description</td>
<td>Linked RoadMap Tasks</td>
<td>Resources</td>
<td>Council Leads</td>
<td>Approx. Duration</td>
<td>Delivery Timing</td>
<td>Deliverable / Outcome</td>
</tr>
<tr>
<td>----------</td>
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<td>-----------------</td>
<td>-----------------</td>
<td>---------------------</td>
</tr>
<tr>
<td>13</td>
<td>Develop Risk Assessment Methodology and Framework</td>
<td>1</td>
<td>Determine Asset Management System risk / opportunity assessment requirements.</td>
<td>Council</td>
<td>Asset Planning Coordinator, Governance Advisor, Asset Management Steering Team</td>
<td>2 months</td>
<td>Short</td>
<td>AMS Risk Assessment needs identified.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>2</td>
<td>Modify Council’s Corporate Risk Assessment Approach, as necessary.</td>
<td>13.1 Council</td>
<td>Asset Planning Coordinator, Governance Advisor, Asset Management Steering Team</td>
<td>18 Months</td>
<td>Short to Medium</td>
<td>Revised corporate risk management approach.</td>
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<td>14</td>
<td>Develop Asset Investment Planning Framework</td>
<td>1</td>
<td>Review of existing Council asset investment review / approval processes</td>
<td>Council</td>
<td>Director Corporate Services, Asset Management Steering Team</td>
<td>2 months</td>
<td>Medium</td>
<td>Opportunities to leverage existing processes/ tools. Any workflow “gaps” identified.</td>
<td></td>
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<td>15</td>
<td>Develop Asset Management Delivery Platform: Capture of Asset Management Requirements in Contracts</td>
<td>1</td>
<td>Capture of asset management requirements in Contracts.</td>
<td>Council</td>
<td>Asset Planning Coordinator, Procurement and Fleet Manager, Asset Management Steering Team</td>
<td>2 months</td>
<td>Medium to Long</td>
<td>Contracts accurately and consistently address asset management requirements</td>
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<td>2</td>
<td>Develop Guidelines for alternative Forms of asset management contracting.</td>
<td>15.1 Council</td>
<td>Procurement and Fleet Manager, Asset Management Steering Team</td>
<td>2 months</td>
<td>Long</td>
<td>Asset Management Contracting Guidelines</td>
<td></td>
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<tr>
<td>16</td>
<td>Develop Asset Management Delivery Platform: Develop Project Management Approach for Asset Management</td>
<td>1</td>
<td>Develop corporate Project Management Framework (covering asset management)</td>
<td></td>
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<td>Long</td>
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<td>2</td>
<td>Develop and implement a Project Management training regime</td>
<td></td>
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<td></td>
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<td>Medium</td>
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<td>17</td>
<td>Develop Asset Management Delivery Platform: Define Asset Management Handover Procedures</td>
<td>1</td>
<td>Ensure capture of asset management requirements in existing PD Toolkit initiative.</td>
<td>Council</td>
<td>Asset Planning Coordinator, Infrastructure Planning &amp; Design Manager, Financial Services Manager, Coordinator Engineering.</td>
<td>2 months</td>
<td>Short</td>
<td>PD Toolkit developed meets asset management requirements.</td>
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<td>2</td>
<td>Document procedures for realisation and capitalisation of handed-over assets</td>
<td>Council</td>
<td>Asset Planning Coordinator, Infrastructure Planning &amp; Design Manager, Financial Services Manager</td>
<td>4 months</td>
<td>Short</td>
<td>Consistent approach to asset capitalisation that meets financial and operational requirements.</td>
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<td></td>
<td></td>
<td>2</td>
<td>Develop a “Pilot” AMP using the template developed to test / refine the template.</td>
<td>18.1 Council External Provider</td>
<td>Asset Planning Coordinator, Asset Management Working Group(s)</td>
<td>4 months</td>
<td>Short</td>
<td>Refined AMP Template and completed AMP</td>
<td></td>
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<tr>
<td>19</td>
<td>Asset Management Planning Platform: Develop State of the Assets Report</td>
<td>1</td>
<td>Capture and document existing asset strategies.</td>
<td>9.2, 18.1 Council</td>
<td>Asset Planning Coordinator, Asset Management Steering Team</td>
<td>2 months</td>
<td>Short</td>
<td>Existing asset strategies and their decision criteria</td>
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<td>2</td>
<td>Develop Asset-specific Levels of Service</td>
<td>19.1 Council</td>
<td>Asset Planning Coordinator, Asset Management Steering Team</td>
<td>12 months</td>
<td>Short</td>
<td>Asset Levels of Service</td>
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<td>3</td>
<td>Develop State of the Assets Report (SoAR).</td>
<td>19.2 Council</td>
<td>Asset Planning Coordinator, Asset Management Working Group(s)</td>
<td>2 months</td>
<td>Medium</td>
<td>SoAR Document</td>
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<td>Task No.</td>
<td>Task Description</td>
<td>Sub-Task No.</td>
<td>Sub-task Description</td>
<td>Linked RoadMap Tasks</td>
<td>Resources</td>
<td>Council Leads</td>
<td>Approx. Duration</td>
<td>Delivery Timing</td>
<td>Deliverable / Outcome</td>
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<td>20</td>
<td>Asset Management Planning Platform:</td>
<td></td>
<td>Dev.velop draft list of AMPs and their</td>
<td>Council</td>
<td>Asset Planning Coordinator, Asset Management Working Group(s)</td>
<td>1 month Short Preliminary AMP Program</td>
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<td></td>
<td>Develop Asset Management Plans</td>
<td>1</td>
<td>delivery timeframe</td>
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<td>21</td>
<td>Develop Asset Management Competency</td>
<td></td>
<td>Determine minimum competencies for Asset Management System roles.</td>
<td>Council</td>
<td>Asset Planning Coordinator, Human Resources Manager, Asset Management</td>
<td>1 month Medium AM Competency Framework</td>
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<td></td>
<td>Framework and Plan</td>
<td>1</td>
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<td>Steering Team</td>
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<td>2</td>
<td>Map competencies of staff assigned to AMS roles.</td>
<td>Council</td>
<td>Asset Planning Coordinator, Human Resources Manager, Asset Management</td>
<td>1 month Medium Clarity of staff roles</td>
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<td>3</td>
<td>Undertake a gap analysis of staff competencies.</td>
<td>21.1, 21.2</td>
<td>Council Asset Planning Coordinator, Human Resources Manager, Asset</td>
<td>1 month Medium Staff competence improvement needs understood.</td>
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<td>Management Steering Team</td>
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<td>4</td>
<td>Create an Asset Management Competence Development Plan</td>
<td>21.3</td>
<td>Council Asset Planning Coordinator, Human Resources Manager, Asset</td>
<td>3 months Medium Plan to close any competence &quot;gaps&quot;</td>
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<td>Management Steering Team</td>
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<td>22</td>
<td>Asset Management Awareness</td>
<td></td>
<td>Develop asset management induction pack.</td>
<td>Council External</td>
<td>Asset Planning Coordinator, Human Resources Manager, Asset Management</td>
<td>2 months Medium Asset Management Induction Pack</td>
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<td>1</td>
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<td>Provider</td>
<td>Steering Team</td>
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<td>2</td>
<td>Develop staff AM training materials</td>
<td>Council</td>
<td>Asset Planning Coordinator, Human Resources Manager, Asset Management</td>
<td>3 months Medium Staff AM Training Materials</td>
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<td>Steering Team</td>
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<td>23</td>
<td>Asset Information Improvement: Asset</td>
<td></td>
<td>Map the workflows supporting the Asset Management System</td>
<td>Council</td>
<td>Asset Planning Coordinator, Director Corporate Services, Asset Management</td>
<td>6 months AMS Process Maps and</td>
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<td></td>
<td>Management Process Mapping and Data</td>
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<td>Working Group(s)</td>
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<td>Analysis</td>
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<td>2</td>
<td>Determine the data requirements for the workflows mapped.</td>
<td>23.1</td>
<td>Council Asset Planning Coordinator, Asset Management Working Group(s),</td>
<td>6 months Medium Asset Management System data requirements</td>
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<td></td>
<td>Director Corporate Services</td>
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<td>24</td>
<td>Asset Information Improvement: Asset Information Improvement: Asset Management Process Mapping and Data Analysis</td>
<td>1</td>
<td>Review existing asset hierarchy</td>
<td></td>
<td>Council</td>
<td>Asset Planning Coordinator, Director Corporate Services</td>
<td>3 months</td>
<td>Short</td>
<td>Revised asset hierarchy</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2</td>
<td>Develop or revise data standards</td>
<td>24.1, 24.2</td>
<td>Council</td>
<td>Asset Planning Coordinator, Asset Management Working Group(s)</td>
<td>2 months</td>
<td>Short</td>
<td>Agreed asset information data Standards</td>
</tr>
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<td></td>
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<td>3</td>
<td>Develop information improvement program</td>
<td>23.2, 24.1, 24.2, 24.3</td>
<td>Council</td>
<td>Asset Planning Coordinator, Director Corporate Services, Asset Management Working Group(s), Asset Management Steering Team</td>
<td>3 months</td>
<td>Short</td>
<td>Comprehensive and high-quality asset data to support the Asset Management System</td>
</tr>
<tr>
<td>25</td>
<td>Asset Management Document Control</td>
<td>1</td>
<td>Determine asset management document control requirements</td>
<td></td>
<td>Council</td>
<td>Asset Planning Coordinator, Asset Management Steering Team,</td>
<td>1 month</td>
<td>Short / Medium</td>
<td>AMS document control needs understood.</td>
</tr>
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<td></td>
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<td>2</td>
<td>Incorporate procedures developed into existing corporate governance / document control procedures</td>
<td>25.1</td>
<td>Council</td>
<td>Asset Planning Coordinator, Asset Management Steering Team, Asset Management Working Group(s)</td>
<td>1 month</td>
<td>Medium</td>
<td>Revised document control procedures aligned to AMS requirements</td>
</tr>
<tr>
<td>26</td>
<td>Asset Management Plan to Budget Workflow</td>
<td>1</td>
<td>Document the workflow from Asset Management Plan to approved Budget.</td>
<td>14.2</td>
<td>Council</td>
<td>Asset Planning Coordinator, Director Corporate Services, Asset Management Steering Team</td>
<td>2 months</td>
<td>Medium</td>
<td>Documented AMP to Budget workflow.</td>
</tr>
<tr>
<td>27</td>
<td>Management of Change</td>
<td>1</td>
<td>Identify possible changes and their influencing factors, by asset class.</td>
<td>19.3</td>
<td>Council</td>
<td>Asset Planning Coordinator, Asset Management Steering Team, Asset Management Working Group(s)</td>
<td>3 months</td>
<td>Medium</td>
<td>Comprehensive list of possible changes, by asset class.</td>
</tr>
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<td></td>
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<td>2</td>
<td>Develop measures to mitigate the risks of changes identified.</td>
<td>13.1</td>
<td>Council</td>
<td>Asset Planning Coordinator, Human Resources Manager, Asset Management Steering Team</td>
<td>2 months</td>
<td>Medium</td>
<td>Identified measures to mitigate risks of change.</td>
</tr>
<tr>
<td>28</td>
<td>Control of Outsourced Activities</td>
<td>1</td>
<td>Develop an Asset Management Strategic Sourcing Strategy</td>
<td>3.2</td>
<td>Council</td>
<td>Noosa Leadership Team, Governance Advisor, Procurement and Fleet Manager</td>
<td>2 months</td>
<td>Medium</td>
<td>AM Strategic Sourcing Strategy</td>
</tr>
<tr>
<td>29</td>
<td>Quality Management Plan</td>
<td>1</td>
<td>Investigate integration of AMS performance management requirements in existing Council quality management and audit functions</td>
<td>10.2</td>
<td>Council</td>
<td>Asset Planning Coordinator, Governance Advisor, Asset Management Steering Team</td>
<td>2 months</td>
<td>Medium</td>
<td>Required amendments to existing Plans or functions.</td>
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<tr>
<td>Task No.</td>
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<td>30</td>
<td>Failure / Root Cause Analysis</td>
<td>1</td>
<td>Capture and documentation of routine asset failures</td>
<td>Council</td>
<td>Asset Planning Coordinator, Asset Management Working Group(s)</td>
<td>24 months, Short/ Medium</td>
<td>Database of routine asset failures and the factors that influence them</td>
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<td>2</td>
<td>Implement process of routine failure review in work management system</td>
<td>Council</td>
<td>Asset Planning Coordinator, Asset Management Steering Team, Civil Operations Manager, Procurement and Fleet Manager, Asset Management Working Group(s)</td>
<td>6 months, Medium</td>
<td>Failure review process embedded.</td>
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<td>3</td>
<td>Implement a process of post-delivery review for larger capital projects (including revision of Standards).</td>
<td>Council</td>
<td>Asset Planning Coordinator, Infrastructure Planning &amp; Design Manager</td>
<td>6 months, Medium</td>
<td>Project review process refined.</td>
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