



PRESERVING ASSET MANAGEMENT KNOWLEDGE

Tips and strategies to retain, share and build on asset management efforts in your community

Local governments put a lot of work into advancing asset management planning and knowledge in their communities. Staff may take training to become certified, attend regional asset management events to learn new ideas, build or update asset inventories and develop asset management plans and strategies.

Read this tip sheet for information on how to:

- Retain asset management knowledge
- Reduce the impact of staff turnover on asset management
- Continue to support cross-functional teamwork in the face of change

A common challenge: After investing time and resources into improving asset management knowledge and processes through projects and training, communities can face a loss of this knowledge due to ineffective communication and documentation processes, often related to staff turnover. A strong culture of knowledge sharing, knowledge collection and collaboration can help avoid these costly knowledge gaps.

Tips and strategies

FOR HEAD ADMINISTRATORS

Engage council and senior leadership early and often, to ensure they understand how asset management is being used to address your community's resource needs.

- Create a council on-boarding process that introduces new councillors to your asset management policies and core ideas (e.g., renewing existing infrastructure before undertaking new builds, considering risk in managing assets, understanding how levels of service affect cost). **FCM's Tool: Starting the conversation about asset management provides tools and templates to engage council and raise awareness about the benefits of asset management.**
- Keep council informed about your community's long- and short-term staffing and budgeting risks through an asset management roadmap and climate risk assessment.
- Have council endorse an organizational succession plan that outlines risks and mitigating strategies, so council understands where additional or reallocated resources may be needed.

Develop an inter-departmental approach to asset management.

- Having an asset management champion is a great way to maintain momentum and embed asset management across your organization. But keep in mind that the champion can't do it all—each department needs to be invested in and responsible for asset management.
- Ensure operations and maintenance staff are consulted at all stages of asset management planning and strategy development. Asset management plans that include insight from those doing the work on the ground will be more comprehensive.
- Integrate asset management considerations into community planning by framing discussions around risk, service levels and cost. Avoid relegating asset management to its own sphere, as this can hinder long-term planning and lead to a loss of asset management knowledge.
- Set up and provide ongoing support for an internal asset management network where knowledge and information can be shared.
- Initiate discussions of how asset management intersects with cross-cutting issues. For instance, you may wish to consider how climate change is impacting service delivery and disproportionately affecting certain groups in your community. **FCM's Integrating Climate Considerations: Service delivery planning can help you identify climate change impacts that may affect your service delivery plan.**



FOR HEAD ADMINISTRATORS

Participate in asset management industry events and organizations.

- Nominate a representative from your local government to join your local, regional or provincial/territorial asset management community of practice. You may wish to work with your human resources department to incorporate regional asset management participation into targeted job descriptions.
- Encourage staff to participate in organizations, conferences and events related to asset management.

- Promote asset management through regular education and training for staff and council.
- Consider developing a graduate, summer student or apprenticeship program in fields such as business, engineering, urban planning and trades. Making opportunities available to students and recent graduates can increase their interest in local government and create a pool of potential full-time hires who appreciate the value of asset management.
- Periodically review all asset management roles, responsibilities and competencies in your organization to identify skills gaps and training or resource requirements.

FOR ASSET MANAGEMENT LEADS

Implement standardized processes to guide asset management projects and record keeping.

- For each project, use processes and templates that are replicable and adaptable, such as (1) a project brief that defines the objective, budget, participants, communication needs, and risk reduction strategies; and (2) a RASCI responsibility matrix that assigns who is **R**esponsible, **A**ccountable, **S**upporting, **C**ontributing and who needs to be kept **I**nformed for each item.
- Create and follow standardized approaches to ensure asset management data and processes are documented consistently.
- Create a single central repository for asset management documents and databases and keep it up to date. Document metadata for all asset management information, including any assumptions made, to help ensure consistent data capture, especially when there is staff turnover.
- If possible, store project information on an online file sharing platform, to facilitate easy access for the project team.

At the beginning of a project, set up processes to keep team members informed about changes and progress throughout the project.

- Schedule regular touch base meetings, and assign a staff member to take, file and circulate meeting minutes and use them to create and maintain an issue tracking list and project archive.
- Assign a staff member to create and circulate quarterly progress reports to the project team and the head administrator for updates to council.
- For projects that are already underway without a process in place, coordinate with your head administrator to digitize and organize information such as project briefs, files and emails, and meeting minutes into project folders. A replicable filing system increases accessibility and allows team members to find project information more efficiently.

FOR ASSET MANAGEMENT LEADS

As soon as possible after staffing changes, replace project staff and update the RASCI matrix. If there has been a major change to the organizational structure, make sure asset management positions are reassigned and staff understand the roles and responsibilities of the new positions. You may wish to work with your human resources team to build asset management considerations into job descriptions, to make this process easier during transition periods.

Develop an asset management steering committee to keep information flowing among project teams, move projects forward and retain knowledge.

- Ensure senior leadership is represented on and takes ownership of the committee, to lend legitimacy to its objectives and maintain momentum. Your local asset management community of practice may have presentation templates or workshops that you can use to build leadership's awareness about how asset management can effectively address community issues.
- Ensure the committee and project teams include representation from each department or asset class, including public works/operations and maintenance and finance.

Where possible, use internal staff and resources to develop asset management projects, to help build an internal asset management culture and competencies.

- If consultants are required, incorporate regular communication and knowledge transfer points—possibly through training, workshops or presentations—into the project.
- FCM's Ensuring continuation of asset management once consultant services are complete has tips on how to get the most benefit from working with consultants and ensure post-project momentum.

Take advantage of external resources and support.

- Access FCM's asset management resource library for toolkits, guides, courses and case studies to advance your asset management planning efforts.
- Contact your local provincial and territorial association and asset management communities of practice for resources and ideas.
- Collaborate with neighbouring communities to share lessons learned and tips and resources about overcoming asset management hurdles.
- Subscribe to FCM Connect to stay up to date on FCM program offerings and asset management resources.



FOR HUMAN RESOURCES

Ensure your offboarding plan for departing staff captures their asset management knowledge.

- Try to have a successor in place at least a few weeks before a planned departure. This overlap allows outgoing staff to be part of onboarding their replacement and share their knowledge directly.
- Consult with your asset management lead to determine what types of asset management knowledge need to be captured during an exit interview. You may want to ask about operations plans, such as maintenance schedules and condition assessments, and safety protocols and emergency response plans, to name a few.

Work with council to empower your head administrator.

- Ensure the head administrator plays a leadership role in setting and documenting procedures.
- Maintain open lines of communication with your head administrator, including regular discussions on the root causes of high turnover and role dissatisfaction, as well as mitigation efforts.

Embed asset management responsibilities and contingency plans into organizational and human resources policies, including an asset management policy.

- Include responsibilities for asset management, knowledge sharing and protection of organizational knowledge in job descriptions. This aims to improve staff understanding of and accountability for the tasks required and increase cross-functional teamwork and collaboration.
- Provide information and training on asset management in the onboarding process for new staff.
- [Access the Canadian Network of Asset Managers' Asset Management Competency Framework for Canadian Communities for tools to help embed asset management into your hiring processes \(available online with free registration\).](#)

Be mindful of staff skills and career aspirations.

- Offer opportunities for professional development and growth, to boost career satisfaction, reduce turnover and bolster internal asset management expertise.
- Encourage staff mentorship and peer-to-peer learning across the organization to facilitate knowledge transfer.

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