

Existing AM Policy	Proposed AM Policy	Rationale
<p>Purpose (Existing) – Page 1</p> <ol style="list-style-type: none"> 1. To set the guidelines for implementing consistent asset management practices and procedures throughout the City of St. Albert. 2. To articulate the City’s commitment to: <ol style="list-style-type: none"> a. Ensuring the City’s long-term management of assets is done in a sustainable manner that meets the Council-defined acceptable condition for the assets to be used by the residents, visitors, the environment, and the corporation. b. Meeting Federal and Provincial legislative requirements for asset management. c. Demonstrating transparent and responsible asset management processes that align with demonstrated best practice. d. Ensuring an integrated approach across all business units in asset management service delivery. e. Establishing a consistent approach for the rehabilitation, repair, and replacement of the City’s assets. 	<p>Purpose (Proposed) – Page 1</p> <p>Now reads:</p> <p>“To establish a clear and unified direction for how the City of St. Albert will manage its assets to deliver sustainable, equitable, and resilient services to the community, now and into the future.”</p> <p>“To articulate the City’s commitment to consistent and holistic cross-departmental approach to asset management (AM) practices across the organization which support long-term planning, financial sustainability, and transparent decision-making across the entire asset lifecycle.”</p>	<p>Rationale for Update and Additional Note</p> <ul style="list-style-type: none"> • To simplify, the existing “Purpose” was paired down into two sentences for Proposed Purpose. • Most of the content from the existing “Purpose” is included within these two proposed sentences with the exception of: • 2(b) Meeting Federal and Provincial legislative requirements – moved to proposed Standards Section # 2

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<p>Policy Statement (Existing) – Page 1</p> <ul style="list-style-type: none"> Refers to asset categorization of Corporate vs. Infrastructure assets. 	<p>Policy Statement (Proposed) – Page 1</p> <ul style="list-style-type: none"> Refers to asset categorization of Core vs. Non-Core Assets (see definitions section below for Core Asset list). 	<p>Rationale for Update and Additional Notes</p> <ul style="list-style-type: none"> Corporate vs Infrastructure Asset breakdown did not align with the current Asset Portfolios. The Core vs Non-Core categorization aligns with O.Reg. 588/17. This Ontario regulation requires all municipal Core Assets to have Asset Management Plans. In the absence of provincial AM legislation and requirements, it is advantageous to mirror a leading province in the field of AM within Canada as we will be proactive if Alberta regulates AM.
<p>Definitions (Existing) – Page 2</p> <ul style="list-style-type: none"> Existing definitions referred to the Corporate vs Infrastructure asset breakdown. Outlined all assets that fell within each category. This approach was problematic as not all assets are listed, and the breakdown is not consistent with AM Portfolios. 	<p>Definitions (Proposed) – Pages 2-4</p> <ul style="list-style-type: none"> Updated some definitions for consistency. Added new definitions such as Asset Portfolio, Condition Assessment, Core & Non-Core Assets, Essential Service, Lifecycle, Lifecycle Costs, Maintenance, Renewal, Replacement, Resilience. 	<p>Rationale for Update and Additional Notes</p> <ul style="list-style-type: none"> Definitions are now consistent with the AM Glossary Refrained from listing assets except for what is included as Core assets (water, wastewater, stormwater, roads, bridges, and culverts). Some new terms added to tie in emergency management and resilient infrastructure work. This was suggested as part of consultation with stakeholders. Other new terms added to distinguish different lifecycle activities.

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<p>Responsibilities (Existing) – Pages 3 & 4</p> <ul style="list-style-type: none"> • Council Responsibility – ‘b’ stated they establish levels of condition • Business Unit Asset Management Group - responsibilities of Council, CAO, AM Committee, Business Unit AM Group, and All Staff. • Business Unit Asset Management Group - Statement ‘d’ read To deliver acceptable condition levels to the Council approved standards. • All Staff – Reads “Any staff member that has a responsibility to program, instigate, govern or oversee work that results in the creation, upgrade, renewal, receipt (gifted or otherwise) or disposal of assets that are owned or held in the custody of the City, at the completion of each specific asset’s activity must collect all required asset information and ensure that all asset information is handled as specified on the asset management plan.” 	<p>Responsibilities (Proposed) – Pages 4 & 5</p> <ul style="list-style-type: none"> • Council Responsibility - Levels of condition replaced with Levels of Service • Business Unit AM Group– Removed as these responsibilities are covered under all staff and the standards/expectations. • All Staff – Responsibilities are simplified and now reads: <ul style="list-style-type: none"> a. Ensure accurate Asset Information is collected and recorded according to City guidelines. b. Remain in compliance with applicable Asset Management procedures. 	<p>Rationale for Update and Additional Notes</p> <ul style="list-style-type: none"> • Council Responsibility – Council responsible for approving Levels of Service while condition is tied more to performance • All Staff responsibilities simplified for conciseness.

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<p>Standards (Existing) – Pages 4 & 5</p> <p>1. All relevant legislative requirements together with political, social, and economic environments are to be taken into account in AM.</p>	<p>Standards (Proposed) – Pages 5 & 6</p> <p>1. Contextual Considerations – Asset Management decisions shall be integrated with applicable legislation, climate adaptation strategies, Corporate Guidelines and Management and the City’s equity and inclusion commitments. Broader policy, social, and economics contexts will be considered in planning and prioritization processes.</p>	<p>Rationale for Update and Additional Notes</p> <ul style="list-style-type: none"> Proposed Standard # 1 named “Contextual Considerations” Added climate adaptation strategies and equity & inclusion commitments per stakeholder suggestions
<p>2. Methodical cyclic reviews will be applied to all asset classes to ensure that assets are managed, valued, and depreciated in accordance with appropriate best practice and applicable provincial standards as specified on the asset management plans.</p>	<p>2. Continuous Improvement and Data Integration – The City shall conduct cyclic reviews of Asset Management practices and will align with international best practices (including but not limited to) the ISO 55000 and the International Infrastructure Management Manual (IIMM), National Standards and Guidance, and Provincial requirements. Asset Information shall flow in a timely manner to digital systems, and data quality will be maintained to support planning, operations, and reporting.</p>	<ul style="list-style-type: none"> Proposed Standard # 2 was named Continuous Improvement and Data Integration. Added AM best practice and standards alignment as part of regular reviews Added data integration and quality to support not only reporting but overall lifecycle decision making (EMM-AM project)
<p>3. Asset Renewals required to maintain assets at an acceptable condition level as identified in asset management plans and long-term financial plans will be funded as a matter of priority in the annual budget estimates.</p>	<p>3. Funding for Service-Aligned Asset Management Activities – Asset Management Activities (such as Renewals, Replacements, or Maintenance) required to maintain acceptable condition levels shall be funded as a priority. Funding decisions will be aligned with defined Levels of Service, Risks, and Lifecycle Costs.</p>	<ul style="list-style-type: none"> Proposed Standard # 3 was named Funding for Service-Aligned AM Activities Added to include AM activities other than just renewals such as replacement and maintenance. Also tied funding decisions to balance Levels of Service, Risks, and Lifecycle Costs

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<p>Standards (Existing) cont... Pages 4 & 5</p> <p>4. Asset information that is created or changes as a result of creating, upgrading, renewing, receiving, and disposing of assets owned by or in the custody of Council will flow in a timely fashion to the appropriate AM systems.</p>	<p>Standards (Proposed) cont... Pages 5 & 6</p> <p>4. Lifecycle Costing in Decision Making – Lifecycle costs will be documented and considered in decisions related to Assets including planning, acquisition, operations, Maintenance, Renewal/rehabilitation, and disposal costs, when available. Evidence-based decision-making shall be applied to ensure an appropriate balance among Levels of Service, Risks, and Lifecycle Costs, with professional judgement used where data or evidence is limited or unavailable.</p>	<p>Rationale for Update and Additional Notes</p> <ul style="list-style-type: none"> Existing Standard # 4 was tied into Proposed Standard # 2 Proposed Standard # 4 named Lifecycle Costing in Decision-Making. Captures the incorporation of costs across the lifecycle of assets and using evidence from asset data to make balanced decisions. There are cases where we don't have the required data. As such, professional judgement shall be used in lieu of quantifiable evidence when making asset decisions.
<p>5. Levels of acceptable conditions documented on the asset management plans and approved by Council will be funded as a matter of priority in the annual budget process.</p>	<p>5. Inspection and Condition Monitoring – Condition of Assets will be monitored to ensure Levels of Service are maintained and to identify Renewal and/or Replacement priorities. A formal inspection strategy may be required depending on Asset criticality. Inspection results will inform updates to Asset Management Plans and budgets.</p>	<ul style="list-style-type: none"> Proposed Standard # 5 named Inspection and Condition Monitoring Re-worded to clarify condition of assets are tied to meeting Levels of Service and identifying financial priorities. Also added condition that not all assets will require a formal inspection strategy based on criticality.
<p>6. Future lifecycle costs will be reported and considered in all decisions relating to new assets and upgrading of existing assets</p>	<p>6. Community-Informed Levels of Service – Levels of Service will be determined considering community feedback, where appropriate, and shall be approved by Council. Stakeholder engagement may be considered in determining social value, which would include special events, to influence the prioritization of future repair, maintain or replacement (RMR) program Levels of Service.</p>	<ul style="list-style-type: none"> Existing Standard # 6 moved to Proposed Standard # 4 (Lifecycle Costing in Decision Making) Proposed Standard # 6 named Community-Informed Levels of Service. Added section to tie in Levels of Service and community feedback where appropriate. Last sentence was included as per Council Motion that passed on July 16, 2024.

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<p>Standards (Existing) cont... Pages 4 & 5</p> <p>7. An inspection regime will be used as part of asset management to ensure acceptable conditions are maintained and to identify asset renewal priorities.</p>	<p>Standards (Proposed) cont... Pages 5 & 6</p> <p>Existing Standard # 7 moved to Proposed Standard # 5 (Inspection and Condition Monitoring)</p>	<p>Rationale for Update & Additional Notes</p> <ul style="list-style-type: none"> Existing Standard # 7 moved to Proposed Standard # 5 (Inspection and Condition Monitoring)
<p>8. Future levels of acceptable conditions will be determined in consultation with the community.</p>	<p>Note: Removed Existing Standard # 8 from proposed document</p>	<ul style="list-style-type: none"> Existing Standard # 8 was removed because levels of acceptable condition are not determined in consultation with the community. Levels of Service may be determined considering community feedback where appropriate. See Proposed Standard # 6 (Community-Informed Levels of Service) for clarification