



Asset Management Centre (AMC)

Greening Asset Management
Niagara Provider Forum March 2009



Asset Management Centre (AMC)

- ❖ Overview of the Asset Management Centre
- ❖ Building Blocks of Green Asset Management Planning



AMC - Background

- Province committed \$1 million to establish an asset management centre for the sector
- Agreement between MMAH & SHSC
- Function under accountability framework of SHSC
- Governance structure includes representation from key sector stakeholders: sector organizations, service managers, governments and government agencies



AMC Membership

- Service Manager Network
- Ontario Non-Profit Housing Association
- Cooperative Housing Federation
- Social Housing Services Corporation
- SHSC Financial Inc.
- Ministry of Municipal Affairs & Housing
- Local Housing Corporations
- Canada Mortgage & Housing Corporation
- The Agency for Cooperative Housing
- The Association of Municipalities of Ontario
- MEI – Ministry of Energy & Infrastructure



AMC Mandate

- Become recognized leader and resource on asset management
- Provide resources, encourage investment in capital repairs
- Support research, house technical expertise
- Deliver training
- Lead the sector on energy efficiency



AMC Mandate, cont'd.

- Self-sustaining

- Create sound asset management framework
 - Coordinate standards, develop resources for asset management

 - Preventive maintenance through to creation of capital plans

 - Identify opportunities to plan/manage capital expenditures



Governance Structure

- Committees:
 - Steering

 - Executive
 - Technical
 - Education & Training
 - Finance
 - Policy



Technical

- Develop and promote technical tools and standards
 - Standard RFP template for BCAs and companion software
 - Standard definitions
 - Technical resources (4 hired over time)
 - Best practices
 - Server / system for data capture
 - Accessibility



Education & Training

■ Modules

- Overview of Asset Management
- Preventive Maintenance
- Safety Awareness
- Building Condition Audits and Capital Reserves
- Managing Capital Projects



Finance

- Identify financial impediments in the current system and encourage innovative approaches
 - Develop a common understanding of the benchmark for annual contributions to capital reserves
 - Provide input to and comment on the financial implications of work led by other
- Capital planning standards, definitions and templates
- Refinancing options / leveraging



Policy

- Capital spending plans
- Ministerial consent process
- Legal Framework – end of operating agreements
- Research on standard documentation
- Accessible Built Environment Committee
- Review of existing/new legislation/regulations
- Definition of terms
- Accreditation
- Best practices
- Supporting and sharing resources (on-going)



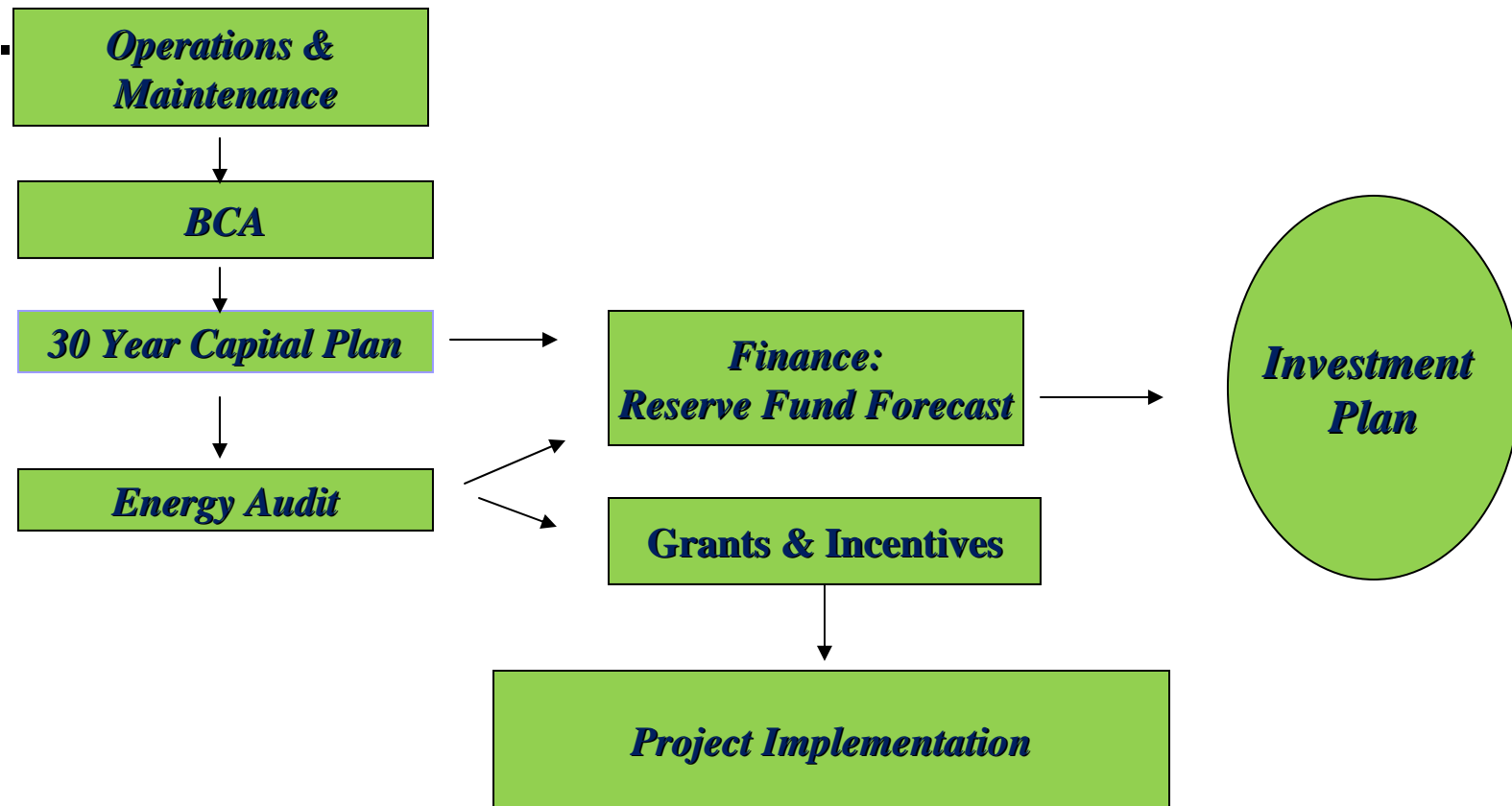
Next Steps - AMC

- Receipt of provincial funding
- Continue to establish the Centre
- April Planning Session
- Launch – Fall 2009
 - Products (including: BCA Templates, software)
 - Services (including: technical advice, education, etc.)
 - Best Practices



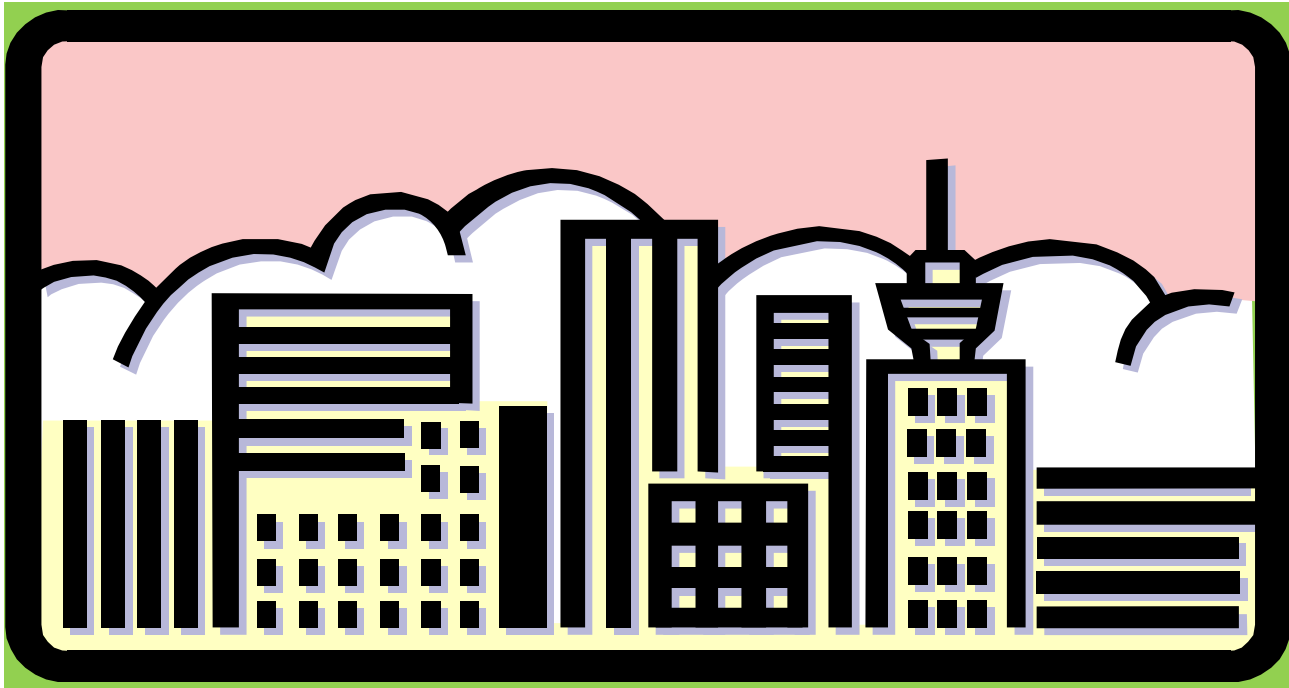
The Energized BCA as a key
building block
to
Green Asset Management
Planning

The BCA as a Key Building Block



Your Portfolio

Buildings , Houses, Offices, Programs





Creating a Sound Energized BCA

Key Disciplines Involved:

- Architecture
- Building Science
- Building & Fire Codes
- Engineering
- Quantity Surveying
- Preventive Maintenance
- Financial Analysis & Planning
- Legislation/Regulations/Policy/Standards



Elements of a Standard Energized BCA

- Inventory
- Capital Planning and Life Cycle Issues
- Code and Regulatory Compliance
- Designated Substances Review
- Energy Audits: opportunities to reduce costs (GLOBE)
- Maintenance and Technical Audits
- Municipal Standards
- Budget Projection Analysis
- BCA Work Plan Development and Implementation – 3-5 year review cycle



Undertaking Your BCA

- Review Building
- Identify Component Cycle
- Conduct Environmental-Energy Audit
 - Assess Energy & Water Usage
 - Conservation Opportunities
- Identify Repair Needs
- Review Recommended Capital Plan
- Assess need for Operational Improvements



Inventory Your Assets

Equipment	Type	Maintenance	Frequency	Annual Records
Fire Panel	Mircom	Inspect & Test	Weekly, Monthly	Certification
Elevator	Otis	Inspect service	Monthly	Certification
Heating	York	Inspect service	Quarterly	Service Report
Cooling	Goodman	Inspect service	Quarterly	Service Report
Domestic Hot Water	James Woods	Inspect service	Annual	Service Report
Electrical Panels	Sylvania	Inspect service	Annual	Service Report
Plumbing	Water Sanitary	Inspect service	Annual	Service Report
Sump Pumps	Armstrong	Inspect service	Annual	Service Report
Appliances	Maytag	Inspect service	Annual	Inspection Report



Capital Items

- Physical Condition
- Estimated Age
- Normal Life Span
- Estimated Replacement Cycle
- Priority Ranking
- Preventative Maintenance Recommendations

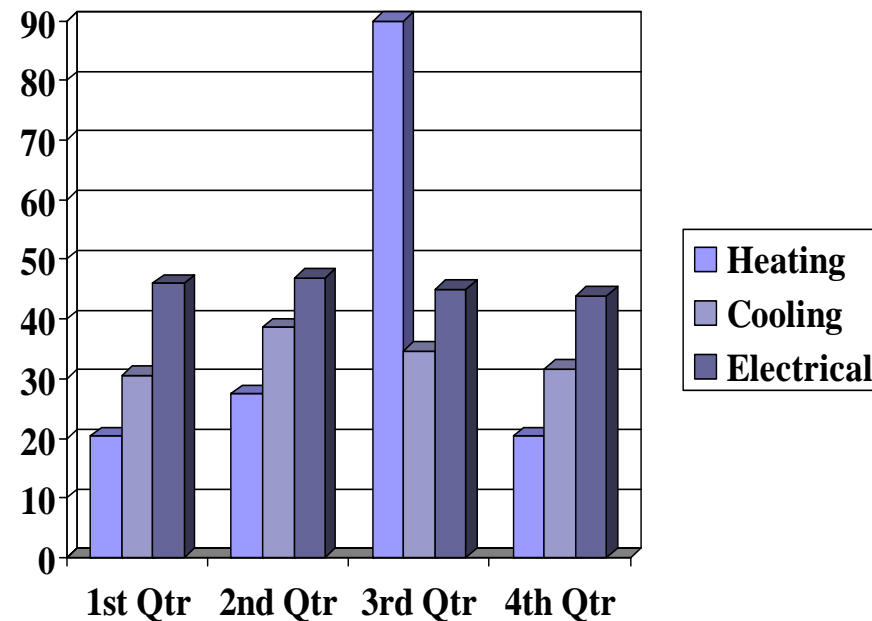


Operational Inputs

- Planned Work
 - Capital Work
 - Preventive Maintenance
 - Deferred Maintenance
 - Special Projects
 - Policy Issues

Work Orders

- Occupant Generated By Category
- Plumbing
- Heating
- Electrical
- Cooling
- Doors & Locks
- Other





Operations & Management Costs

- Administrative Support Staff
- Maintenance Staff
- Cleaning Staff
- Contracted Services
- Repair Costs
- Head Office Overheads
- Management Costs
- Administrative Staff
- Bookkeeping Costs
- Legal Costs



Environmental Sustainability

- ❖ The Energy Audit
 - Review all components consuming energy
 - Analyze Two Years of Utility Cost
- Identify potential savings with capital replacement costs
- Recommend changes and procedures
- Work with GLOBE



Emergencies

- Fire
- Floods
- Heat
- Hydro
- Life safety system failure
- Any issue that may be life-threatening or cause bodily injury



Risk Management

■ Operations

- Occupational Health and Safety
- Fire Safety
- Inspections
- Staff Development
- Emergency & Continuity Planning

■ Finance and Administration

- Financial Controls
- Insurance
- Procurement
- Records



Financial Management

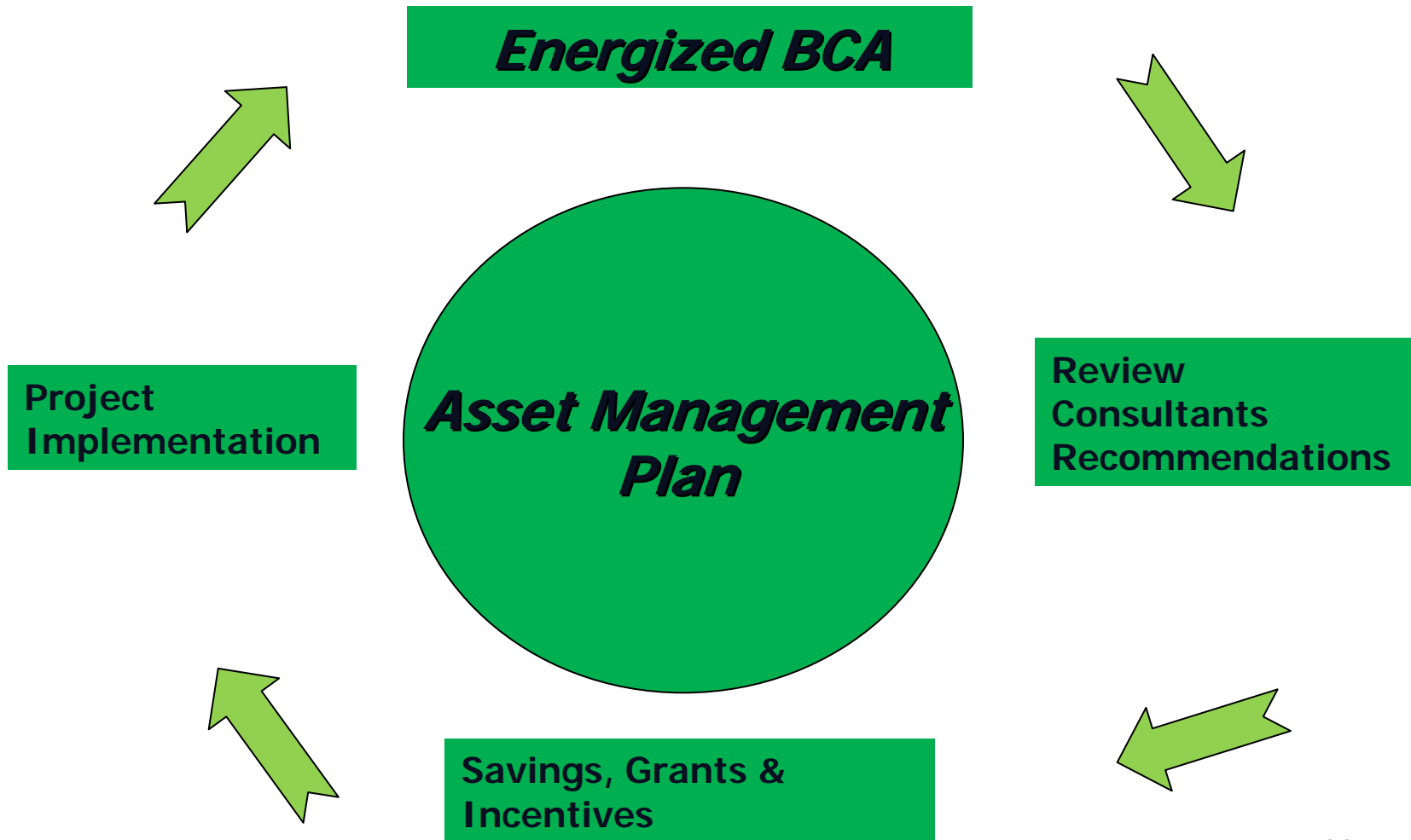
- Capital Plan
- Energy Savings Plan
- Reserve Fund Forecast
- Reserve Contribution
- Operations Plan



Standards

- ✓ Best Practices
- ✓ Component Life Cycle
- ✓ Preventative Maintenance
- ✓ Capital Plan
- ✓ Replacement Value
- ✓ Energy Audit (GLOBE)
- ✓ Safety & Risk Management

Planning and Working with Your Energized BCA





Remember...

- Evolving process and use principle of constant improvement
 - Update every 3-5 years
 - Consider legislative, regulatory changes, or industry standard changes
 - Best practices



Summary...

- The new AMC is being established to assist the sector – service managers and housing providers to develop asset management plans
- More information will be available shortly on a the Centre's services
(i.e., technical services, advice and templates, education and training)



Contact Information...

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□ **THANK YOU!**