Water Environment Association of Ontario | Ontario Water Works Association

UTILITY ASSET MANAGEMENT SELF ASSESSMENT MATRIX

	(Score each question on a scale of 0 - 5)	Learning / Innocence / Maturity Level 1 (1-25)	Applying / Awareness / Maturity Level 2 (26 - 50)	Embedding / Development / Maturity Level 3 ((51 - 75)	Optimizing & Integrating / Competence / Maturity Level 4 (76 - 100)	Continuous Improvement / Excellence / Maturity Level 5 (101 - 125)	Score	Total
Corporate Strategy/Policy and Planning	Is your Strategic Plan (with the Triple Bottom Line) updated every 5 years? Is progress tracked and reported regularly and communicated to everyone in the organization?							
	Does your organization have a Wastewater Master Plan in Place (Based on Hydraulic, Climate Change Modeling and Demand Projection) and updated every 5 years?							
	Does your organization have an IT Master Plan in Place and updated every 2 years?							
	Does your organization have a People Master Plan in Place and updated every 2 years?							
	Does your organization have a Levels of Service Framework in Place? (Corporate, Customer, Asset)							
Physical Assets	Do you consider your *Asset Acquisition* process to be effective, standardized, involves all key players and results in best solution that considers the needs of O&M?							
	Do you consider your *Asset Operation* well configured, operated, monitored & controlled to ensure that the target levels of service are achieved with the least input of consumables such as labor, energy, chemicals, and equipment?							
	Is your Asset Maintenance strategy optimized that includes supporting standards, procedures, FMEA techniques and enabled by business systems?							
	Is your Rehabilitation or Replacement decisions based on risk management to achieve the best outcomes holistically across financial (economic), social, and environmental aspects, models predict end of economic life?							
	Do you disposal of unwanted assets in such a way that it complies with legal, social, and environmental requirements. Do you have formal disposal procedures have been developed and are maintained?							
Technology Assets (Hardware, Connectivity and Business Systems)	Do you have core Business Systems in place to support business processes and properly configuring and deploying fully trained staff in using the systems?							
	Do you have hardware and networking infrastructure that fully supports end user needs for accessibility, ease of use and system speed?							
	Do you currently deploy an Integration Architecture system to meet the goals of a single asset registry, entering data once and using in it many times as needed and minimizing redundant activities; the integrated solution is effectively managed as an asset?							
	Are your Database Records in place and fully developed to support AM needs for asset knowledge?							
	Is your data of high integrity and is trusted and regularly used to support asset management practices?							
Supporting Business Processes	Is your Customer Service process effective and ensures Customer Service levels are consistently met at a high quality (monitored thorough appropriate KPIs and Targets)?							
	Do you have Financial processes in place that are effective and fully support revenue, budgeting, payables, receivables and phasing of expenditure to meet AM needs?							
	Stores processes are effective and meet the goals of right part at the right time to support customers, high service level and minimum inventory value.							
	Do you have Purchasing processes that are effective and meet the goals of right parts and external services at the right time to support customers, high service level and meet policy guidelines?							
	Do you employ Continuous Improvement where data is used on an ongoing basis to create information and drive value through risk based decision making?							
People Arrangements Needed to Support Asset Management	Is the structure of your organization well designed to enable effective execution of all business processes, work coordination, coordination, authority, responsibility and control?							
	Do you have all the necessary job descriptions, roles, responsibilities, skills and competencies in place to support asset management?							
	Do you have effective skills development processes in place to ensure availability of necessary skills and competencies to support asset management needs?							
	Do you have an effective performance management framework in place to ensure that overall asset management goals are been met or exceeded by business units and all teams?							
	Do you have active knowledge management in place based on a risk model to ensure that all necessary asset knowledge is captured, stored and shared with all that need it?							
							Total	

Contact Information

Name:	
Position:	
Company/Organization:	
E-mail:	

DISCLOSURE:

Are you willing to share the results of this assessment with the participants at this workshop? **YES** **NO**

(Please circle the appropriate response)