



*7 Third Avenue
Whitney, Ontario*

AGENDA

**ASSET MANAGEMENT COMMITTEE MEETING
January 17, 2024 Immediately Following the Committee of Adjustment Meeting**

**Council Chambers
Municipal Office
7 Third Avenue
Whitney, Ontario**

And ZOOM and livestreamed to You Tube Channel: South Algonquin Council

Open Meeting/Call to order

1. Additions / Amendments to the Agenda
2. Adoption of the Agenda
3. Disclosure of Pecuniary Interest
4. Delegations/Presentations:
 - Neil Warwick & Nancy & Ray Campbell – Request to stop up and close road allowance between Concession 6 & 7 Lyell Ward
 - Tracy Mumma - Request to close Shore Road Allowance – Lyell Lake
5. Unfinished Business
 - Zoning By-Law Amendment – Short-Term Rentals
6. New Business
 - Asset Management Primer for Elected Officials – Information
 - Proposed Walkway Park -Madawaska
7. Adjournment

NOTE: Submissions received from the public, either orally or in writing, may become part of the public record.



DELEGATION REQUEST FORM

Schedule "A" Procedural By-law 20-622

TO BE A DELEGATION AT A REGULAR COUNCIL OR COMMITTEE MEETING you must complete this form, in its entirety and submit it to the office no later than 1:00 p.m. seven days prior to the meeting at which you wish to be heard. Council agendas are finalized the Thursday prior to the meetings. The CAO/Clerk-Treasurer reserves the right to designate the request to the appropriate meeting upon review of the completed form.

APPLICANT INFORMATION:

FIRST NAME: NEIL LAST NAME: WARWICK

TITLE/ORGANIZATION (if applicable): _____

SPOKESPERSON(S): NEIL

NUMBER OF PEOPLE EXPECTED TO BE IN ATTENDANCE: Zoom

MAILING ADDRESS: _____

TELEPHONE NO.: _____

Has this subject matter been brought to council previously: yes no

Please describe the topic or subject matter you wish to address:
UNOPENED ROAD ALLOWANCE BESIDE MY PROPERTY. - JAN 17TH MEETING

If you are seeking a specific action or decision please explain:
CLOSE AND CONVEY TO ADJOINING LAND OWNERS OR HAVE INPUT ON THE PROPOSED USE OF THE UNOPENED ROAD ALLOWANCE

Is this a time sensitive issue: yes no

Do you have supporting documentation: yes no

If yes: Please ensure documentation is attached or has been forwarded to clerk@southalgonquin.ca with the application. Please provide a copy of materials used in your presentation, if any, to the Clerk. Materials provided prior to the meeting will be circulated to Council/Committee for their review before the meeting. Please be advised all materials including your name form part of the Public Record.

Signature: [Handwritten Signature]
Date: 1-8-24



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APPLICANT INFORMATION:

FIRST NAME: NANCY RAY LAST NAME: CAMPBELL

TITLE/ORGANIZATION (if applicable): _____

SPOKESPERSON(S): _____

NUMBER OF PEOPLE EXPECTED TO BE IN ATTENDANCE: 2

MAILING ADDRESS: _____

TELEPHONE NO.: _____

Has this subject matter been brought to council previously: yes no

Please describe the topic or subject matter you wish to address:
ROAD ALLOWANCE. CLOSE OR SELL.

If you are seeking a specific action or decision please explain:

Is this a time sensitive issue: yes no

Do you have supporting documentation: yes no

If yes: Please ensure documentation is attached or has been forwarded to clerk@southalgonquin.ca with the application. Please provide a copy of materials used in your presentation, if any, to the Clerk. Materials provided prior to the meeting will be circulated to Council/Committee for their review before the meeting. Please be advised all materials including your name form part of the Public Record.

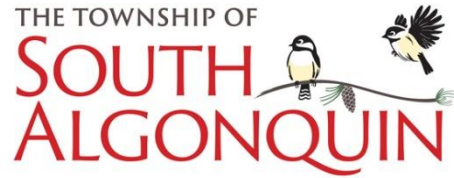
Signature: Nancy Campbell
Date: Jan 10/24

STAFF REPORT

Meeting Date: January 17, 2024

Agency: Township of South Algonquin

Staff Contact: Tracy Cannon, Planning & Building Admin.



Agenda Title: Unopened Road Allowance Between Concession 6 & 7 Lyell

Recommendation That the Committee authorize staff to proceed with the request for the use of a road allowance between Concession 6 & 7, Lyell Ward for lands legally described as Concession 6 Lot 11, PT Lots 9 & 10, locally described as 4199 Highway 523; and THAT a resolution of such be presented at the Council Meeting of February 7, 2024.

Background: Staff have received three written requests; two requests from the owners of lands legal described as Concession 6, Pt Lot 9, locally known as 4379 Highway 523 and Concession 7 PT Lot 9, locally known as 4407 Highway 523 to stop up and close the road allowance between Concession 6 & 7, Lyell Ward and that the township convey ownership of the lands to the two adjoining landowners. For this report this request will be referenced as “Request #1”. The other request is from the owner of the property legally described as Concession 6 Lot 11, PT Lots 9 & 10, locally known as 4199 Highway 523 for the use of the said road allowance to access the rear of the property. For this report this request will be referenced as “Request #2”.

Analysis:

Request #1

Below is a key map of the lands requesting the township to stop up, close the said road allowance. If approved the Road Allowance would need to be surveyed and conveyed evenly between the two properties.



Unopened Road Allowance Policy By-Law No. 2022-699

Per the policy, Council may close any portion of an opened or unopened road allowance and convey ownership of all or some of the lands.

Closure and conveyance of any road allowance, including a shore road allowance, may be considered by the Township only where conditions are met, which include; Access to any other lands is not impacted because of the closure.

Stopping up, closing and declaring surplus of the said road allowance would prohibit public access and potential future transportation to the crown lands to the west of the subject properties and to Concession 6 Lot 11.

Request #2

Below is a key map of the lands requesting to utilize the said road allowance for access purposes to increase maple syrup production. Access over part of the 194 acres is obstructed by the terrain and an Environmentally Protected Area (EP).



Comprehensive Zoning By-Law

Being that the request is for access proposes to expand maple syrup production on the property a review of the Comprehensive Zoning By-Law was conducted. The property is zoned Rural (RU). The use is considered “Agriculture” and is a permitted use in Table 8.1 of the Comprehensive Zoning By-Law. Agriculture is defined as “general farming and without limiting the generality of the foregoing including, but not limited to, the raising and harvesting of field, bush, tree or vine crops, gardening, nurseries, greenhouses, dairying, animal husbandry, maple syrup production, raising of poultry, chickens, turkeys or other fowl, fur-bearing animals, fish, hogs, game animals or the growing of mushrooms, bee keeping and such uses as are customarily and normally related

to agriculture, including the sale of produce grown on the farm from which the sale is made. **Therefore, the current use of maple syrup production conforms with the Rural Zone standards.**

Unopened Road Allowance Policy By-Law No. 2022-699

Council may grant use of a road allowance, or an encroachment on to either an open or an unopened road allowance, the following policies shall apply, as determined by the Township:

- a. The actual location of the road allowance must be clearly determined. This is the responsibility of the applicant and may be required to be verified by an Ontario Land Surveyor, at the expense of the applicant. **The road allowance will need to be verified by an Ontario Land Surveyor as there are private properties on both sides of the subject road allowance. The length of the road allowance being requested to be used will also need to be defined.**
- b. If a new entrance way is required, the approval of the Operations Department as to its location, width, size, and length of culvert to be installed and the grade at which it intersects the Township Road is required. **Not applicable.**
- c. Where entry is upon a roadway not under the jurisdiction of the Municipality, the standards and specifications of the Ministry of Transportation shall apply. **Approval by The Ministry of Transportation is required.**
- d. If brushing and clearing of the road allowance is undertaken, arrangements for the disposal of brush and/or compensation for wood of value harvested on the road allowance shall be obtained in writing by the Owner from the Township. **The applicant would be required to make these arrangements with the Works Superintendent, if necessary.**
- e. If the application is for the provision of an access road, driveway or right-of-way, the minimum width of clearance shall be as stipulated in the Township Zoning By-law (approximately 6 metres). The driveway shall be in the centre of the road allowance wherever possible, leaving an equal buffer on either side of the cleared area, unless otherwise approved by Council. **A buffer area is recommended to be left between the road allowance and the adjacent private properties. The width and the buffer area should be demonstrated on the survey.**
- f. The applicant shall acknowledge in writing that all improvements to the road allowance are at the sole expense of the applicant and all such improvements must be approved by the Township. The applicant must also acknowledge in writing that any member of the public has the right to use the subject road allowance. **See below.**
- g. The applicant must post a notice on the road allowance in a form acceptable to the Township, advising all users of the road allowance that the roadway is an unassumed municipal roadway and is used at his/her own risk. **See below.**
- h. The applicant must acknowledge in writing that the Township assumes no liability, responsibility, or obligation whatsoever to construct and/or maintain and/or repair the road allowance. **See below.**
- i. The applicant must agree to indemnify and save harmless the Township its employees and councillors from all manner of actions, causes of actions, claims or demands whatsoever for or by reason of any personal injury and/or property damage of or in any way arising out of any accident whatsoever occurring on the road allowance. **See below.**

F, H, I may be included in a Road Allowance Agreement between the applicant and the township. The agreement does not have to be registered on title, as it is temporary access. The agreement will be reviewed by the township lawyer at the expense of the applicant prior to endorsement. The agreement should include the length of time temporary access will be required.

The notice sign listed in G. will also be reviewed by the township lawyer prior to posting.

Conclusion:

To avoid disturbance to the Environmentally Protected (EP) on part of the said property, it is recommended that the Committee direct staff to proceed with a resolution to proceed with “Request #2” on the condition that;

- the applicant provide a survey completed by an Ontario Land Surveyor clearly defining the road allowance and the length that is being requested to be used.
- the Algonquins of Ontario and the Ministry of Natural Resources and Forestry be sent notice.
- The Ministry of Transportation approves an entrance from Highway 523.
- a buffer be left between the road allowance and the two properties adjacent to the road allowance.
- the township and the applicant enter into a Road Allowance Agreement
- a notice sign is posted on the said road allowance; and
- any costs associated with the said road allowance be paid by the applicant.

It is recommended that the Committee reject “Request #1” as closure of the road allowance would prohibit access to other lands.

Fiscal Impact: If approved by Council a \$250.00 fee is applicable for the Road Allowance Agreement should the applicant wish to proceed with the request per the Schedule of Fees By-Law.

The applicant will be responsible for legal, surveying, and any fees required by the Ministry of Transportation.

Alternatives:

- 1) Stop up, sell and declare surplus a portion of the road allowance per “Request #1”.
- 2) Enter into an agreement for the use of the road allowance per "Request #2”.
- 3) Do nothing.



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APPLICANT INFORMATION:

FIRST NAME: Tracy LAST NAME: Mumma

TITLE/ORGANIZATION (if applicable): _____

SPOKESPERSON(S): Tracy Mumma, Carl Mumma

NUMBER OF PEOPLE EXPECTED TO BE IN ATTENDANCE: 2

MAILING ADDRESS:
[Redacted]

TELEPHONE NO.: _____ E-MAIL: [Redacted]

Has this subject matter been brought to council previously: yes no

Please describe the topic or subject matter you wish to address:
Purchase of shore road allotment/full property and creation of an easement for 198 Davies Ln

If you are seeking a specific action or decision please explain:
Approval to proceed with shore road allotment /full property purchase and apply
for establishment for a legal easement for 198 Davies Ln Madawaska

Is this a time sensitive issue: yes no

Do you have supporting documentation: yes no

If yes: Please ensure documentation is attached or has been forwarded to clerk@southalgonquin.ca with the application. Please provide a copy of materials used in your presentation, if any, to the Clerk. Materials provided prior to the meeting will be circulated to Council/Committee for their review before the meeting. Please be advised all materials including your name form part of the Public Record.

Signature: Tracy Mumma Carl Mumma

Date: 1/10/24



To: Mayor LaValley and Council

From: Tracy Cannon, Planning & Building Administrator

Committee Meeting Date: January 17, 2024

RE: Shore Road Allowance Sale Application - Mumma

RECOMMENDATION:

THAT the committee authorize staff to proceed with the request to purchase the Shore Road Allowance in front of LYELL CON 5 PT LOT 13 PCL;17771, Lyell Ward, locally known as 178 Davies Lane adjacent to Lyell Lake on the condition that an easement be granted benefitting 198 Davies Lane through the Consent Application process.

AND that a resolution be presented at the February 7, 2024 Council meeting.

ANALYSIS:

Davies Lane is an unmaintained laneway across the unopened shore road allowance which travels off the shore road allowance onto private property and is used for access by the abutting property owner. Due to the unopened shore road allowance having no legal agreements with the municipality for it’s use it creates potential for liability. Therefore, there is a need for the laneway to be subject to an easement in favour of the abutting property owner across the entirety of the existing laneway for access purposes. Staff recommend proceeding with the sale of the unopened shore road allowance on the basis that the applicant apply for consent for the purposes of creating an easement, and that it be granted to the abutting landowner for access proposes.

Adjacent landowner at 162 Davies Lane has no objections with the applicant purchasing the Shore Road Allowance. The owner of 198 Davies Lane is in agreeance as long as access to their property is guaranteed.

KEY MAP

- 178 Davies Lane
- Shore Road Allowance
- Easement

**ALTERNATIVES:**

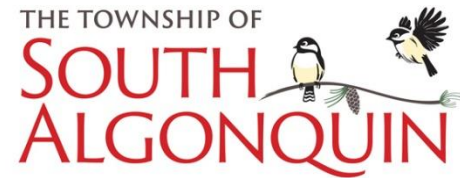
- 1) Stop up, close the Road Allowance with the requirements of an easement benefitting 198 Davies Lane.
- 2) Do nothing

STAFF REPORT

Meeting Date: January 17, 2024

Agency: Township of South Algonquin

Staff Contact: Tracy Cannon Planning & Building
Administrator



Agenda Title: Zoning By-Law Amendment – Short-Term Rentals

Recommendation That the committee direct staff to proceed with the public meeting as prescribed by the Planning Act for the Zoning By-Law Amendment.

AND should Council wish to pursue with a Short-Term Rental Policy following the Zoning By-Law Amendment that a public consultation date be considered at that time.

Background

Council received a STRA Policy Report in the September 6, 2023 council package. The report recommended that public input for the Short-Term Rental Policy be deferred until after a Zoning By-Law Amendment is addressed.

As discussed at the September 6th Council Meeting the current draft Zoning By-Law Amendment will be presented to the public for comment. There was discussion on whether the Short-Term Rental Policy should be presented to the public for consultation at the same time as the Zoning By-Law Amendment.

Analysis

The Zoning By-Law Amendment will likely require revision to the current draft Short-Term Rental Policy. Therefore, it is recommended that a public meeting per the Planning Act for the Zoning By-Law Amendment be scheduled in the near future and should council wish to pursue the Short-Term Rental Policy following the finalization of the Zoning By-Law Amendment, those revisions can be made and presented to the public for input.

It is important to emphasize that currently short-term rentals are not permitted in any zone in the current Comprehensive Zoning By-Law, therefore any property being used for short-term rental accommodations are not in compliance with the by-law.

Although short-term rentals are necessary and desirable to our community, proper management is necessary to ensure that our long-term housing is sustained.

Alternatives

- 1) Schedule two open houses for the Zoning By-Law Amendment only. (Madawaska & Whitney).
- 2) Schedule two open houses for Draft Short-Term Rental Policy and the Draft Short-Term Rental By-Law for public consultation at the same time. (Madawaska & Whitney).
- 3) Proceed with the public meeting as prescribed by the Planning Act for the Zoning By-Law Amendment only and address public consultation at a later date for the Short -Term Rental Policy.
- 4) Do nothing

Strategic Plan – One of the key priorities in the Strategic Plan is Housing – Opportunities to increase more homes.

Fiscal Impact: Additional staff time to prepare for each open houses. Cost of ads for public notice.

Consultations

Bryan Martin, CAO/Clerk Treasurer

Attachments

Draft Zoning By-Law Amendment
September 6, 2023 Staff Report

**CORPORATION OF THE TOWNSHIP
OF SOUTH ALGONQUIN**

BY-LAW NO. 2024-_____
Being a By-law to amend Comprehensive
Zoning By-law No. 2017-527
Short Term Rental Accommodations

WHEREAS the Corporation of the Township of South Algonquin has deemed it appropriate to amend Zoning By-law No. 2017-527 for the purpose of establishing zoning provisions to regulate Short Term Rental Accommodations;

AND WHEREAS authority is provided pursuant to Section 34 of the Planning Act, R.S.O 1990, c.P.13 to pass this By-law;

AND WHEREAS a Public Meeting was held on _____, 2023, pursuant to the provisions of Section 34 (12) of the Planning Act, R.S.O., 1990;

AND WHEREAS the matters hereinafter set forth are consistent with provincial policy and conforms to applicable plans currently in force and effect;

NOW THEREFORE the Corporation of the Township of South Algonquin enacts that By-law No. 2017-527 shall and is hereby amended as follows:

- 1.0 Section 10, Definitions, is hereby amended with the addition of the following Short Term Rental Accommodation definition,

Short-Term Rental Accommodation means the secondary use of a residential Dwelling Unit that offers a place of accommodation or temporary residence, or occupancy by way of concession, permit, lease, license, rental agreement, or similar arrangement for fewer than twenty-eight (28) consecutive calendar days with no on-site management throughout all or part of the year. Short-Term Rental Accommodation uses shall not mean a motel, hotel, bed and breakfast establishment, tourist establishment, tourist cabin establishment, or similar commercial accommodation use. For the purposes of this definition, a secondary use shall mean secondary in terms of time the Dwelling Unit is used as a Short-Term Rental Accommodation. For the purpose of this definition only, a Dwelling Unit shall include a “cottage” but shall not include any “Accessory” building or structure, a tent, a vehicle, recreation vehicle, or a boat.

- 2.0 Section 4, General Provisions, is hereby amended with the addition of the following new Short Term Rental Accommodation provisions as a new Section 4.33

“4.33 Short-Term Rental Accommodations

Short-term rental accommodations, as defined, shall be regulated by the following provisions, in addition to any licencing requirements of the Township.

- a) Short-term rental accommodations shall only be permitted in a principal dwelling unit and shall not be permitted in an accessory structure.
- b) Short-term rentals shall only be permitted on lands which are in compliance with the lot area and frontage requirements of the respective zone.
- c) Short-term rental accommodations must be the principal residence of the owner and operator;
- d) Short-term rental accommodations shall provide the necessary parking in accordance with Table 4.2 of this By-law.
- e) The existing private sewage disposal system is acceptable to adequately service the principal residential dwelling unit and the proposed bed and breakfast establishment;
- f) Short-term rental accommodations may be licenced by the Township.”

- 3.0 Section 5, Residential Zones, Table 5.1, Permitted Uses Table, is hereby amended with the addition of a new use “Short Term Rental Accommodation” in Column 1 and a black circle in Columns 2 and 3.

- 4.0 Section 8, Other Zones, Table 8.1, Permitted Use Table is hereby amended with the addition of a new use “Short Term Rental Accommodation” in Column 1 and a black circle in Column 2.
- 5.0 Section 4.19, Table 4.2, Parking Requirements, is hereby amended with the addition of a new type of building “Short Term Rental Accommodation” in Column 1 “Type of Building” and “1 parking space per bedroom rented” in Column 2, “Minimum Parking Requirements”.
- 6.0 This By-law shall come into force and effect in accordance with the provisions of the Planning Act, R.S.O 1990, c.P.13.

This By-law shall take effect and come into force from the date of its passage by Council.

READ A FIRST AND SECOND TIME on _____, _____, 2024

MAYOR, Ethel LaValley

CAO/CLERK-TREASURER, Bryan Martin

READ A THIRD TIME, PASSED AND ENACTED on _____, _____ 2024

MAYOR, Ethel LaValley

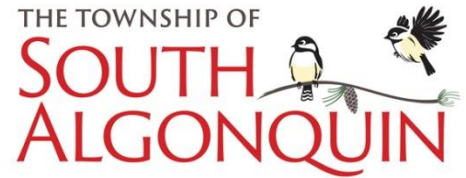
CAO/CLERK-TREASURER, Bryan Martin

STAFF REPORT

Meeting Date: September 6th, 2023

Agency: Township of South Algonquin

Staff Contact: Bryan Martin, CAO Clerk/Treasurer



Agenda Title: STRA Policy

Agenda Action: Information.

Recommendation:

That Staff delay bringing forward public input into the Short-Term Rental Policy until council has made decisions related to the Zoning By-Law amendment (ZBA) required to implement short-term rentals.

Background Short-Term rentals are a necessary and desirable form of accommodation within the Township. Currently short-term rentals are not a permitted use in the zoning by-law and are therefore not permitted in the Township. Staff of the Township have been working concurrently on preparing policy recommendations related to the implementation of a short-term rental ZBA and short-term rental policy. Once council determines which zones, they desire to permit short-term rentals in and whether short-term rentals will be permitted only in a principal dwelling and whether short-term rentals will be permitted in accessory structures a policy will likely be necessary to regulate this use within the Township and this policy likely will require further development once council determines the above.

Analysis: A public meeting for the ZBA is a requirement under the Planning Act, however additional public consultation on the ZBA is recommended. It is recommended that the council delay consultation on the Short-Term Rental Policy until final decisions on the Zoning By-law Amendment have been addressed. The council is currently also undertaking public consultation on the Official Plan and staff believe that too many public meetings in a short time frame may create confusion about which meeting is about what and when. The STRA regulating by-law can then be brought forward sometime early in the new year for further committee consideration and for public consultation.

Alternatives –

- 1) Council implement the recommendation in this report.
- 2) Council proceed with ZBA and STRA policy consultation concurrently

3) Do Nothing

Strategic Plan - Mission Statement “manages with the future in mind.”

Fiscal Impact - none

Consultations – Tracy Cannon -Planning and Building Administrator

Attachments -

Asset Management Primer

For Elected Officials



Introduction

Local governments exist to provide safe, secure, and sustainable municipal services in a predictable and cost-effective manner. This requires keeping infrastructure assets in a state of good repair. These assets make up our roads, bridges and transit networks, water and wastewater systems, community and recreation centres, social housing and much more. They are essential for driving economic growth and a major reason why our residents and businesses choose to live and operate in different communities.

The significant costs associated with managing these assets is an important component of municipal budgets. This is why it is important for you as Council member to have a good understanding of the role of councils in adopting a structured approach to strategically determine infrastructure investment priorities in their municipalities.

With limited financial capacity, staff resources, and increasing service expectations, planning for future capital investments while minimizing risk exposure is challenging. And yet it is a key responsibility of elected officials.

This primer is developed to provide councils with a better understanding of their role in adopting a strategic approach to determine infrastructure investment priorities. The following topics are covered, with links to additional resources throughout this primer:

- [Understanding of asset management](#) and its [fundamentals](#);
- [Developing a policy](#) that includes governance structure;
- [Determining service levels](#) and [engaging the community](#) to set realistic expectations;
- Anticipating [emerging risks](#) such as climate change;
- Reviewing and Implementing [asset management plans](#);
- [Checklist for councils to assess state of asset management](#) in their municipalities;
- [Available support](#) to build internal capacity for making progress in asset management; and
- Asset management [requirements in Ontario](#).



Managing Municipal Infrastructure Assets

Municipal infrastructure assets are typically [categorized](#) into core and non-core assets:

Municipalities manage and maintain these assets to promote local economic development and quality of life for their residents. Each municipality actively decides what infrastructure assets are required to deliver services, and what service levels are appropriate and affordable. This has been the standard practice for decades.

As municipal governments are accountable to citizens through their councils, decisions to invest in infrastructure are based on the needs, desires and aspirations of local communities, and their

ability to pay for the costs of providing these services.

Even though these considerations have always been part of the infrastructure decision-making process in local governments, municipalities are now undertaking a comprehensive and more transparent process in managing assets and the associated services.

This structured and strategic approach, commonly known as asset management, help municipalities to save costs and manage community expectations.



Core assets

Major infrastructure groups representing the most costly municipal infrastructure.

Non-core assets

Services that tend to be unique to each municipality but equally critical and help define the quality of life for residents.

Fact Box: What is Asset Management?

- A structured approach that helps municipalities strategically make cost-efficient decisions with a long-term vision;
- Expands on the traditional approach to managing assets by proactively considering asset renewal using a whole lifecycle approach to meet pre-defined service levels;
- Supports long-term capital investment decisions that balances asset performance, risks and costs to optimize services; and
- Helps prevent service failures and disruptions by better ensuring that all capital investment activities are performed in a timely manner.

The Financial Accountability Office of Ontario (FAO) has [estimated](#) that 45% of municipal assets are not in a state of good repair, with a combined infrastructure backlog of more than \$50 billion. **The backlog is commonly referred to as infrastructure deficit and is defined as the cost required to bring assets up to a state of good repair.** To ensure residents' continued

access to vital services, municipal governments invest strategically in infrastructure through an asset management lens.

In the last few decades, Ontario's municipal governments have made great strides in adopting asset management as a decision-making tool for councils. AMO monitors sector progress in asset management on an [annual basis](#).

Despite the progress made, many small municipalities struggle with advancing asset management in their communities due to lack of:

- **Adequate staff resources and training;**
- **Financial resources to collect and maintain the required data; and**
- **Accurate data on costs, condition and risk assessment for their assets.**

What Do You Need to Know?

The following sections cover some of the steps your Council can consider to support progress in asset management in your municipality.

Understanding and Applying Asset Management Fundamentals

The term asset management has been defined in different ways. According to [international standards](#)¹, **asset management is based on four fundamentals: value, alignment, leadership, and assurance.**

1. VALUE

The **philosophy behind asset management is maximizing asset value by nurturing an organizational culture of coordination and collaboration between staff and Council.** This is done by balancing the associated costs of providing services and the underlying risks against the expected service levels needed to achieve organizational objectives. Staff collect and provide information on costs, risks, and existing performance of assets - also known as service levels - for Council's consideration.



2. ALIGNMENT

A municipality will perform better when Council's strategic goals and infrastructure investments are aligned. This involves ensuring a clear understanding of how assets help Council achieve its strategic objectives. Infrastructure decision-making must be guided by and aligned with the Corporation's vision and goals. The [Township of Centre Wellington, for example](#), has developed a strategic plan that includes good financial management and having safe and well-maintained infrastructure as one of the goals that defines a common vision for the municipality.

Asset Management helps achieve alignment by translating strategic objectives of a municipality such as healthy, safe and connected community into technical, financial and operational decisions.

These decisions include having a dedicated operating and capital budget to keep majority of your roads and bridges in good condition, and ensuring municipal buildings meet capacity demands with changing demographics while being clean and accessible. It also promotes alignment between different departments and service areas by requiring staff to speak the same language and by collecting similar data attributes for assets. To make this possible, it is important to establish an asset management system that aligns Council's vision with staff approach to asset management.

The City of Brampton, for example, has established an asset management system that aligns its strategic plan, official plan and master plans with its asset management policy, strategies and departmental asset management plans.

¹ The [ISO 55000 series](#) represent a global consensus on the definition, terminology, principles, requirements and guidance for implementing and improving asset management at an organization.

Vision and Official Plan

Reviewing the objectives of your Official Plan to use as a guiding document in development of an Asset Management Plan.

Asset Management Policy

Specify guiding principles and staff roles in the development and implementation of the Asset Management Plan.

Budgeting

Setting long-term financial goals and forecasting capital budgets for infrastructure replacement.

Corporate Objectives and Strategic Plan

Determining the goals and strategic vision of the Corporation related to service provision and allocation of municipal resources.

Asset Management Plan

Developing strategies for long-term maintenance and management of infrastructure, monitoring service delivery levels, proactively looking at asset lifespan and planning for upgrades, expansion or replacement.

An asset management system is a framework consisting of various tools, including a policy, governance structure, strategy, and plan that is aligned with strategic objectives of Council. The system works in conjunction with the use of financial, analytical or business intelligence software.

The value of asset management planning is achieved when it impacts the overall budget and specific investment decisions.

Municipalities are expected to consider recommendations from their asset management plans in the development of their annual budgets and long-term financial plans. These are aligned with Council’s vision through the corporate strategic plan.



3. LEADERSHIP

Council has a key role in fostering and supporting asset management through its leadership. This is done by:

- **Engaging** the community to determine expected service levels, affordability and long-term sustainability;
- **Establishing an asset management policy** that defines roles and responsibilities and guiding principles for staff;
- **Providing a supportive environment for staff** to build internal capacity and collect relevant data required to develop, improve and implement asset management plans aligned with Council's strategic objectives;
- **Reviewing recommendations** of the plan and asking the right questions to staff before endorsing the plan; and
- **Determining infrastructure investment priorities** based on future service targets that are realistic and achievable.

This cyclical asset management process is illustrated below:

Community's Input:

Helps Council determine desired service levels

Staff Analysis:

Collect asset data on costs, risks, and current service levels to determine financial capacity



Council Decision-Making:

Set target service levels that are sustainable, identify priority projects and funding sources

Staff Input:

Recommend Actions for Council by developing and presenting an asset management plan for Council's consideration

4. ASSURANCE

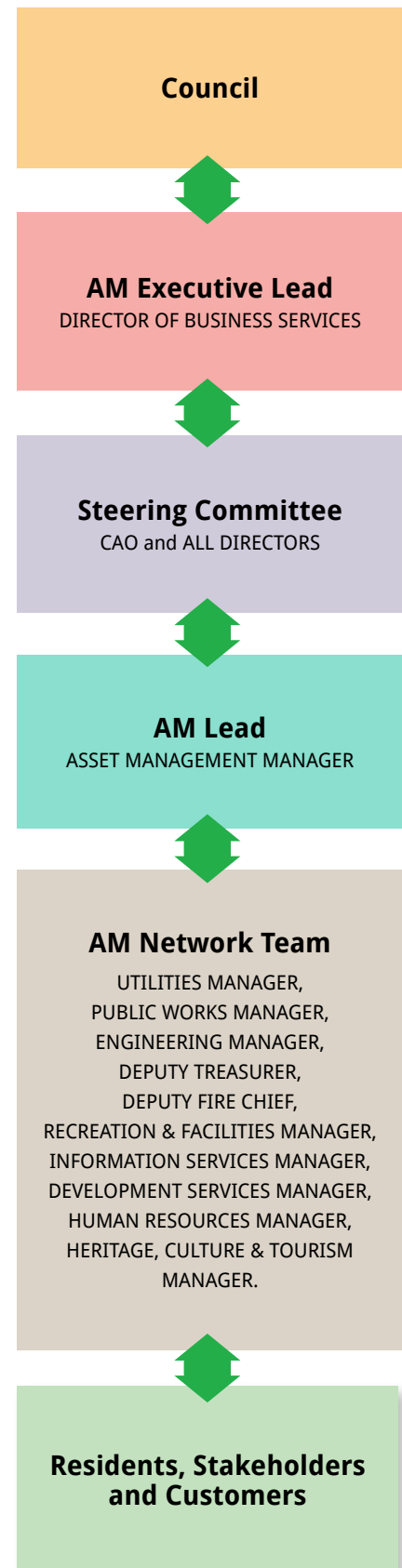
By adopting asset management as a strategic decision-making tool, councils can provide assurance to residents that they meet regulatory requirements, address community needs through appropriate service levels and invest in future development in an objective, consistent, and cost-effective manner. This will help you deliver on community infrastructure while maintaining fiscal integrity, accountability and transparency.

Developing an Asset Management Policy

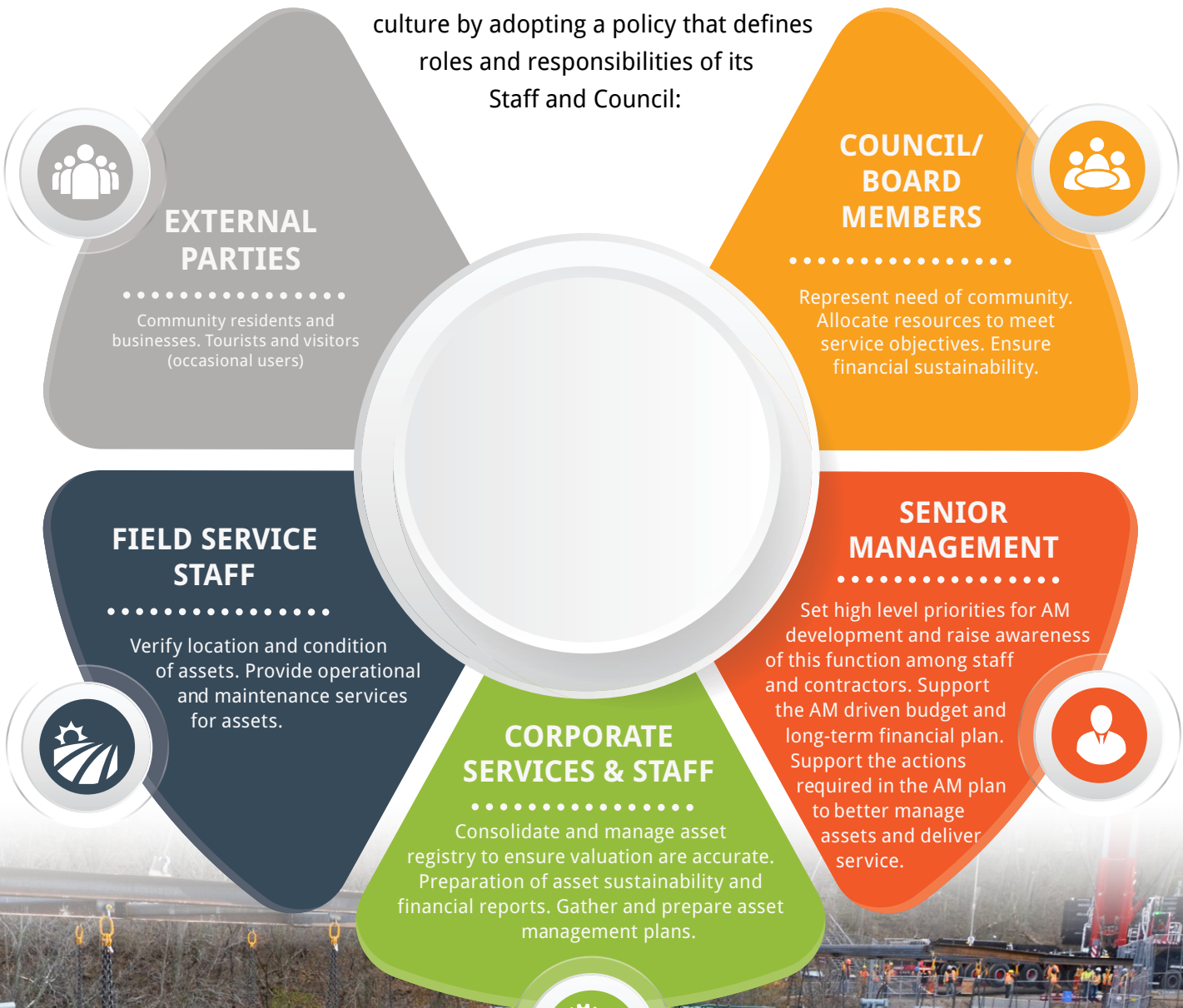
An [asset management policy](#) outlines the principles and framework for developing an asset management plan. **It is a statement of the community's expectations through council on how assets will be managed to deliver services.**

Some of the [key guiding principles](#) that can be included in the policy are:

- Strategic alignment with Council objectives
 - Understanding the interdependency of assets and services to minimize redundancy
 - Integration with budgeting and financial planning
 - Incorporating whole lifecycle costing to evaluate fiscal impact of investment decisions
 - Meeting compliance requirements to access provincial and federal funding streams
 - Consistency with federal and provincial objectives, and climate change resilience, mitigation; and adaptation efforts
- Once approved, your asset management policy will apply to all departments in your municipality that manage assets providing infrastructure-related services. **Your policy should specify a governance structure listing roles and responsibilities according to the size of your municipality to ensure effective coordination and collaboration between staff.** [Loyalist Township](#) has a comprehensive governance structure in its policy to illustrate all staff responsible for delivering infrastructure services understand their role in the achievement of asset management goals:



The Municipality of Central Elgin has been nurturing an asset management culture by adopting a policy that defines roles and responsibilities of its Staff and Council:



Determining Service Levels

Service levels are determined by resident expectations, legislative requirements and available financial resources of a municipality. It typically involves:

- Assessing current condition and functionality of assets that provide services to the community;
- Estimating total costs, from asset acquisition to replacement or disposal, associated with providing a service over the life of an asset;
- Meeting minimum legislative requirements prescribed by senior levels of government. For example, [O. Reg. 239/02](#) of the Municipal Act, 2001, requires minimum maintenance standards (MMS) to provide municipalities with a defense against liability from actions arising regarding levels of care on roads and bridges.
- Determining appropriate service levels is a function of balancing community expectations against what the municipality can sustainably afford, as well as the level of service risk the municipality is willing to take.

The [City of Richmond Hill](#) has developed an extensive list of community and technical service level indicators in their asset management plan to help Council and the public understand current infrastructure performance levels and to identify areas of improvement. **It helps Council determine if its levels of service are achievable in the long term given the current level of investment into the assets that provide those services.** If they are not achievable, Council needs to have a different conversation.

The [Municipality of Neening](#) is establishing service levels for their non-core assets by defining service objectives that resonate with community expectations. These are supported by technical performance indicators based on different service criteria such as availability, maintenance, cleanliness, capacity, safety, and accessibility.



DID YOU KNOW

Service levels are often divided into two categories: community levels of service, which are qualitative statements that Council and public can relate to; and technical levels of service, which are more complex quantitative indicators that staff can track internally to monitor asset performance. In the case of safe drinking water, community service level can be defined as whether safe and potable water is available to residents at an appropriate pressure, while technical performance indicators may include age and condition of water pipes and the capacity of water treatment plants.

As municipalities become more familiar with defining service levels, they can be further refined to reflect the organization's needs based on the following considerations:



Measure Infrastructure System Success

Does current performance meet service objectives?



Provide clarity on priorities to Staff and Public

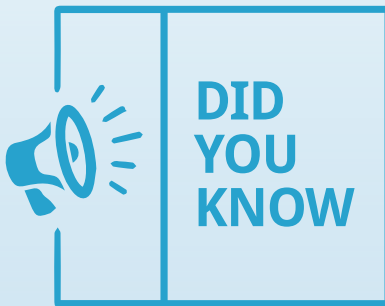
Does the level of service provide insight into which assets are higher priority and rely on collectable data?



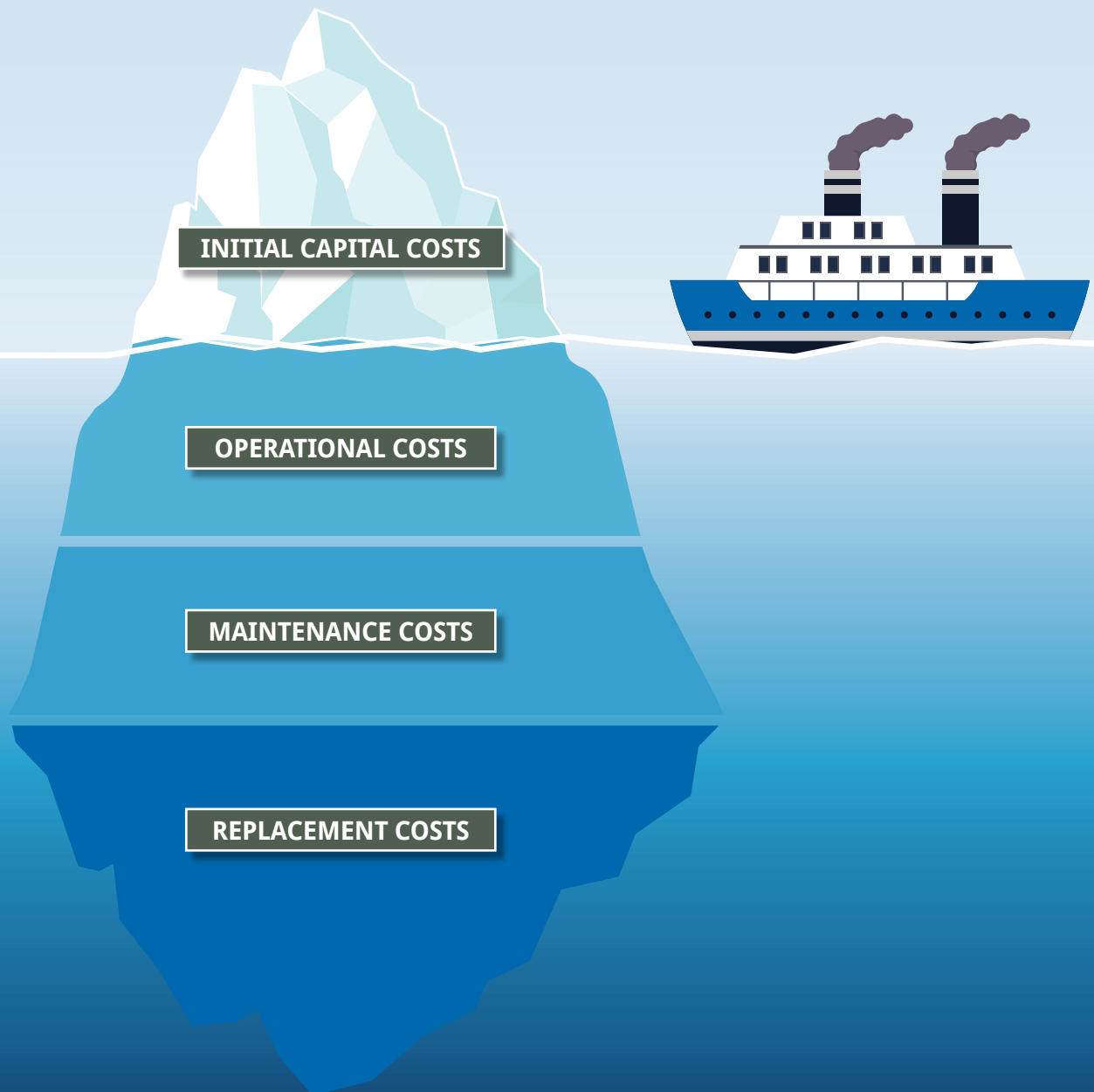
Are inversely related to Cost and Risk

Can service levels be improved without an increase in cost and risk?

Assets Whole Lifecycle Costing



When considering your assets, it is important to apply a whole lifecycle perspective. Think about the total cost of ownership of your assets in the future and not just the initial build cost. The total cost of an asset throughout its life includes planning, design, construction, acquisition, operation, maintenance, rehabilitation and disposal costs. All of the cost elements above should be considered when determining the true cost of an asset over its useful life.

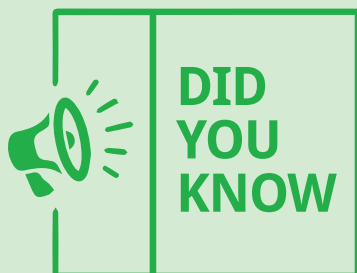




Engaging the Community to Set Realistic Expectations

Consulting the public regarding levels of service is an opportunity to engage the community's feedback on how to balance service levels with risk, and cost. O. Reg. 588/17 requires municipalities to complete public consultation as part of the process to determine proposed or target levels of service. Discussion points could include:

- Breakdown of funding, e.g. [Where Your Tax Dollar Goes \(Peel Region\)](#)
- The cost of inaction and Return on Investment, e.g. quantify potential damages through actual infrastructure failure events or use of a [Risk and Return on Investment Tool \(RROIT\) \(Credit Valley Conservation Authority\)](#)
- What service is needed vs. what asset is required, e.g. reducing leakage in water system rather than building a larger water treatment plant.
- Options to fund a particular service at the required service levels e.g. the [City of Mississauga](#) has a dedicated stormwater fee to keep its stormwater infrastructure system in good condition that was once underfunded under property taxes and development charges due to other competing priorities.
- The [Municipality of Central Elgin](#) has developed an asset management plan for its core assets that meet the requirements of the provincial regulation. This plan is informed by a level of service survey that was published on the municipality's community engagement website.



It is common for smaller municipalities that lack financial and staff resources to share assets, services, staff resources and asset management software. The Municipality of Wawa hired an asset management coordinator as a shared staff resource with three other small municipalities in Algoma district: the Township of Hornepayne, the Township of White River and the Township of Dubreuilville. This partnership with other small municipalities helped Council advance asset management programs, despite having limited financial resources and technical expertise.



Anticipating Emerging Risks Such as Climate Change

Local governments can respond to climate change through a combination of mitigation and adaptation strategies.

Municipal assets such as transportation systems, water management systems and facilities are vulnerable to climate change which can increase the cost of delivering desired service levels with a higher risk of failure and potential service consequences.

Integrating climate change mitigation and adaptation into asset management provides a systematic approach for evaluating trade-offs between service, cost, and risk for built and natural assets. It makes use of existing processes and helps local governments to balance investments, working toward the goal of sustainable service delivery.

There are opportunities for councils to consider

mitigation and adaptation to climate change when investment decisions are made throughout the asset lifecycle, which includes planning and design, construction, maintenance, rehabilitation and decommission. Some municipalities are working to add 'green infrastructure' options as part of their asset lifecycle management, such as the City of Thunder Bay's use of low-impact development options in stormwater management.

The best time to prepare for future design needs is in today's renewal opportunities. Small improvements in design flexibility today can unlock significant long-term

cost savings by enabling cost effective disaster mitigation and improving building resilience and operational flexibility. Future infrastructure could be designed so that inspection, maintenance or replacement of any of your assets does not require a full shutdown.

For example, if a road washes out and must be replaced, it is the best time to update the technical standards to ensure the road and drainage systems can withstand a 100-year storm in the future. Taking advantage of these opportunities requires insight and understanding of future design needs in advance, as well as the ability to leverage climate modelling forecasts.

Reviewing and Implementing Asset Management Plans

An asset management plan is a tool to communicate a municipality's current state and anticipated funding needs to the community and other levels of government. **A good asset management plan will provide the data, analysis and financial requirements to ensure that infrastructure investments are consistent and adequate for your community now and in the future.**

The [Municipality of South Huron](#) has developed a comprehensive asset management plan along with a [guide](#) to assist Council and the public with the terminology used in the plan.

It is also common for some municipalities like the [City of Cambridge](#) to develop an annual report for Council to highlight the findings of its asset management plan and any variances.

When determining priority projects, recommendations in the plan should be weighed against additional considerations that you have insight into such as:

- Impact on the municipality (reputation; legal) if an infrastructure asset does fail;
- Reliability of critical services, health and safety of residents;

- Leveraging cost saving opportunities and availability of external funding while taking into account the long-term financial implications in terms of whole lifecycle costs associated with providing a new service;
- Avoiding redundancies through multi-year planning by working in an integrated manner across your municipality;
- Community attachment to assets with historical and cultural significance; and
- Current demographic profile that helps Council understand future community needs and aspirations, and the current socio-economic conditions in the municipality.



DID YOU KNOW

A municipality's asset management plan is often a single document covering all municipal assets, but for large urban municipalities, plans are sometimes developed at the departmental level. For example, the City of Barrie, with a population of 141,430, developed a [Stormwater Asset Management Plan](#) that highlights the state of stormwater assets and the associated costs associated with mitigating flooding and protecting Lake Simcoe and Little Lake.



Checklist for Councils to Assess State of Asset Management

To identify opportunities for making further progress in asset management in your municipality, here are some key questions that need to be revisited every year:

<input type="checkbox"/>	Do you know what services your municipality provides and what infrastructure assets are required to provide those services?	<input type="checkbox"/>	Is your asset management plan developed in compliance with your policy?
<input type="checkbox"/>	Do you know your community's service level expectations? Are you meeting them and do you have the required financial resources to do so?	<input type="checkbox"/>	Does your plan meet the provincial regulatory requirements and include all infrastructure assets?
<input type="checkbox"/>	What is the total cost of providing these services at the current service levels? Are these costs sustainable?	<input type="checkbox"/>	Does the plan take into account the whole lifecycle cost of assets?
<input type="checkbox"/>	Has your Council engaged the community to set realistic expectations?	<input type="checkbox"/>	Does the plan identify capital investment priorities?
<input type="checkbox"/>	How reliable is your assets data on costs, risks and service levels?	<input type="checkbox"/>	Are there any assets that should be retired and do not need to be replaced?
<input type="checkbox"/>	Does your staff have the required resources and expertise to pursue asset management?	<input type="checkbox"/>	Are there any additional factors that affect service delivery that are not captured in the asset management plan?
<input type="checkbox"/>	Does your municipality have an asset management policy that is aligned with your municipality's strategic plan?	<input type="checkbox"/>	What is the appropriate infrastructure deficit or funding gap for our community? How will it impact service levels, now and into the future, if we continue along the same trajectory?
<input type="checkbox"/>	Does your policy include a governance structure that specifies role and responsibilities?	<input type="checkbox"/>	Does your plan include a financial strategy to address the funding gap? Have you considered debt and alternative revenue streams?

Available Support for Municipalities

Your staff are required to provide reliable information on assets' performance, risks, and costs to enable your Council to deliver sustainable community services. **As an elected official, you can provide the strategic leadership needed to invest in staff training and data collection initiatives to build internal capacity and foster a culture of collaboration and coordination across your municipality.**

AMO supports municipal sector progress in asset management through several capacity-building projects, [policy directives](#), and assessment of sector progress as part of its administration of the Canada Community-Building Fund.

AMO also provides support for municipalities by developing [educational resources](#) for

elected officials, and by delivering training program for municipal staff to build technical expertise and facilitate the adoption of better practices in asset management for Council. In this regard AMO acknowledges the important work of the [FCM's MAMP](#).

Every year, AMO profiles

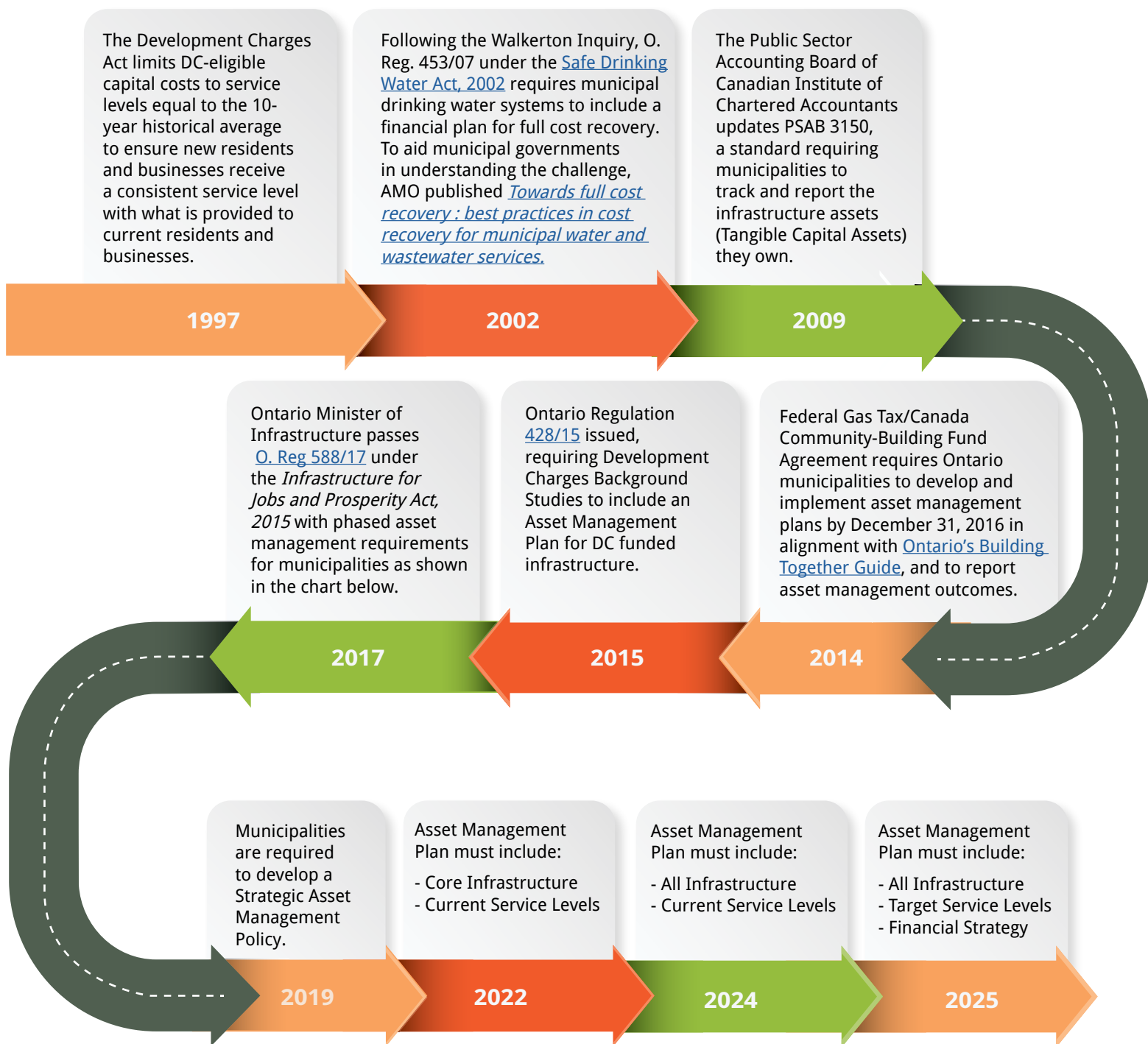
municipalities of different sizes as they make progress in asset management. These [videos](#) highlight the commitment and approach of municipal councils in using asset management as a decision-making tool.

To learn more about available resources and training opportunities or to let us know your story, please contact ccbf@amo.on.ca



Appendix: Asset Management Requirements in Ontario

Over the years, asset management requirements have been gradually introduced and have evolved to promote continuous improvement in successful adoption of asset management in Ontario:





Get in touch

Association of Municipalities of Ontario (AMO)
200 University Ave., Suite 801, Toronto, ON M5H 3C6

Telephone direct: 416-971-9856
 Voicemail: 416-971-8099
 Fax: 416-971-6191
 Toll-free in Ontario: 1-877-4-AMO-LAS (1-877-426-6527)
 E-mail: ccbf@amo.on.ca
 Twitter: [@CCBFinOntario](https://twitter.com/CCBFinOntario)
 Instagram: [@CCBFinOntario](https://www.instagram.com/CCBFinOntario)
 LinkedIn: [The Canada Community-Building Fund in Ontario](https://www.linkedin.com/company/the-canada-community-building-fund-in-ontario)
 Websites: www.buildingcommunities.ca
www.infrastructure.gc.ca