

Asset Management Planning Program

2024 Program and Application Guide

The new [LGPS Online Application Tool](#) is now available. Refer to [Appendix 1](#) for full information.

1. Introduction

The Asset Management Planning program was created in 2014 through a \$1.5 million contribution from the Ministry of Municipal Affairs. Since that time, additional funds have been contributed to the program in order to support planning grants, training subsidies, and the development of asset management resources.

The intent of the program is to assist local governments in delivering sustainable services by extending and deepening asset management practices within their organizations. Since 2015, more than 300 grants and subsidies have been awarded to local governments throughout the province.

Matching grants of up to \$25,000 are available under the 2024 Asset Management Planning program to support activities that advance a local government's asset management planning or practices, and that facilitate better integration of asset management planning with long term financial planning.

Program Goals and Objectives

All local governments own, operate, and maintain a wide array of assets. These include, but are not limited to, transportation and water distribution networks, sewage collection and treatment systems, information technology, vehicle and equipment fleets, parks, and civic facilities.

Asset management is defined as an integrated process bringing together planning, finance, engineering, and operations to effectively manage existing and new infrastructure to maximize benefits, reduce risks, and provide satisfactory levels of service to community users in a socially, environmentally, and economically sustainable manner.

Asset management brings together the skills, expertise, and activities of people with information about a community's physical assets and financial resources so that informed decisions can be made to ensure the sustainable service delivery for citizens today and in the future.

Each local government is different in its scale and chosen approach to asset management. Each local government will define their own activities based on their unique context, starting point, and priorities.

The program seeks to support local governments to take next steps on the path to better asset management practices. A further objective of the program is to support local governments in meeting their asset management commitments under the Canada Community-Building Fund (formerly Gas Tax Fund).

In 2016, local governments were required to complete a survey that identified the current status of their asset management practices. In 2017, as part of the Canada Community-Building Fund Annual Expenditure Report, all local governments were required to identify and commit to activities that will build and strengthen the asset management capacity within their organization. The final asset management requirement under the Canada Community-Building Fund Agreement is reporting out on the improvements made. This was in the form of a survey launched in 2022.

2. Eligible Applicants

Eligible applicants are local governments (municipalities and regional districts) in British Columbia.

For each intake, only one application per municipality will be accepted. Reflecting differences in service delivery, regional districts may submit up to three applications per intake.

3. Grant Maximum

The 2024 Asset Management Planning program can provide up to 50% of total project costs to the grant maximum (\$25,000). The remainder (50%) is required to be funded through community contributions.

The community contribution for a project must be directly related to activities approved in the application and can come from a number of sources, including:

- Cash contribution from local government;
- In-kind contribution from local government;
- Community Works Fund;
- Third-party contribution; and/or
- Other grant funding (see below).

Other Grant Funding

In order to ensure transparency and accountability in the expenditure of public funds, all other grant contributions for eligible portions of the project must be declared and, depending on the total value, may decrease the value of the grant.

FCM Municipal Asset Management Program (MAMP)

For a defined project, eligible applicants may be funded under both the FCM MAMP and the Asset Management Planning program for activities that are eligible under both programs. As FCM will fund up to 80% (to a maximum of \$50,000) and UBCM will fund up to 50% (to a maximum of \$25,000), applicants can leverage both programs to meet the community contribution requirements.

Applicants with approved FCM MAMP projects should forward the complete MAMP application package with the FCM notice of funding approval with their Asset Management Planning Program application.

Canada Community-Building Fund – Community Works Fund (CWF)

Eligible applicants may utilize their CCBF-Community Works Funds to cover the local government portion of eligible activities not funded through other sources such as FCM MAMP. Applicants should consult with the CWF program guidelines to ensure activities are eligible.

Projects that have been approved under the SPF-Capacity Building Stream are deemed ineligible projects under the Asset Management Planning Program, unless they are identified as a distinct or phased component of the overall project.

4. Eligible Projects

As described in [Asset Management for Sustainable Service Delivery: A BC Framework, 2019](#), asset management activities fall broadly under the categories of Assess, Plan, and Implement. The focus of the program is capacity building, supporting initial and improved assessment, and planning activities.

In addition, to qualify for funding, projects must:

- Be a new project or new project component (retroactive funding is not available); and
- Be capable of completion by the applicant within one year from the date of grant approval.

5. Eligible and Ineligible Costs and Activities

Eligible Costs and Activities

Eligible costs are direct costs that are approved for funding, properly and reasonably incurred, and paid by the applicant to carry out eligible activities. Eligible costs can only be incurred from the date of application submission until the final report is submitted.

Under the Asset Management Planning Program, eligible activities must be cost-effective and include the activities identified in Table 1.

Table 1: Eligible Activities	
Eligible Activity	Examples
Assessing	<ul style="list-style-type: none">• Conducting organizational/corporate capacity assessments• Risk assessments
Planning	<ul style="list-style-type: none">• Development of an Asset Management Policy• Development of an Asset Management Plan• Development of an Asset Management Plan component<ul style="list-style-type: none">o i.e. Condition Assessment Framework or Level of Service Framework• Development of an Asset Management Strategy• Development of a Long-Term Financial Plan
Implementing	<ul style="list-style-type: none">• Providing Asset Management Training/Education (<i>see Training for Asset Management</i>)• Outcome reporting• Performance measurement

The following expenditures are also eligible provided they relate directly to the eligible activities identified above:

- Incremental applicant staff and administration costs;
- Consultant costs;
- Public information costs.

Ineligible Costs and Activities

Any activity that is not outlined above or is not directly connected to activities approved in the application is not eligible for grant funding or as the community contribution. This includes:

- Ongoing or regular planning activities;
- Feasibility studies;
- Acquisition of tangible capital assets, including computer hardware;
- Purchase of software, software licensing, service subscriptions, or membership fees;
- Any activity or cost which is considered general operation and maintenance;
- Activities required to meet PSAB 3150 standards (e.g. development (i.e. data collection) of Asset Inventories/Registers).

Training for Asset Management

[Asset Management BC](#) provides information on training opportunities for local governments to advance asset management practices. Refer to their website for current training offerings.

For training offered through Asset Management BC, applicants are encouraged to utilize the [Asset Management Planning training subsidy](#), instead of the Asset Management Planning Program. The subsidy program will cover up to 50% of the registration fee for up to three staff per local government for eligible Asset Management BC training events. Subsidies are provided after successful completion of the training.

6. Application Requirements and Process

The new [LGPS Online Application Tool](#) is now available. Refer to [Appendix 1](#) for full information.

Application Deadline

Applications can be submitted at any time; however, funding permitting, applications will only be reviewed two times in 2024. Applicants will be advised of the status of their application within 60 days of the following application deadlines:

- May 10, 2024
- September 27, 2024

Required Application Contents

All applicants are required to complete the Online Application Form and submit an electronic copy of the following:

- Completed Application Worksheet with all the required attachments;
- Local government Council or Board resolution, indicating support for the current proposed activities and willingness to provide overall grant management;
- Detailed budget that indicates the proposed expenditures from Asset Management Planning Program grant and aligns with the proposed activities outlined in the Application Form. Although additional funding or support is not required, any other grant funding or in-kind contributions must be identified. Applicants are encouraged to use the new [LGPS Budget and Financial Summary Tool](#);
- For eligible projects that have also been funded through FCM, the complete MAMP application package and notice of funding approval from FCM is also required to be submitted.

Submission of Applications

Applications are required to be submitted in two steps:

1. [LGPS Online Application Form](#): This online form must be completed for all applications to LGPS funding programs and includes questions that are common to all grant applications. When the LGPS Online Application Form is submitted, the applicant will receive an email confirmation including the file number that has been assigned to the application, and a copy of the Application Worksheet that must be completed as part of Step 2.
2. Application Worksheet: This worksheet contains questions that are specific to the funding stream and must be submitted by email to UBCM with all the other required attachments.

Refer to [Appendix 1](#) for more information on the new process, application questions and the information that will be required to be submitted during each step.

Worksheets and required attachments should be submitted as Word, Excel or PDF files. Total file size for email attachments cannot exceed 20 MB. All materials should be submitted to Local Government Program Services, Union of BC Municipalities by e-mail: lgps@ubcm.ca.

Review of Applications

UBCM will perform a preliminary review of all applications to ensure the required application contents have been submitted and to ensure that eligibility criteria have been met. Only complete application packages will be reviewed.

Following this, an Evaluation Committee will assess and score all eligible applications. Higher application review scores will be given to projects that:

- Are from applicants that have not previously received funding through the program;
- Align with the Asset Management Framework;
- Complement priorities and commitments under provincial and federal programs;
- Include collaboration or partnering with one or more other local governments (regional opportunities, training, etc.);
- Demonstrate transferability and add value to other local governments;
- Include in-kind or cash contributions to the project (including other grant funding);
- Are cost-effective.

Point values and weighting have been established within each of these scoring criteria. Only those applications that meet a minimum threshold point value will be considered for funding.

The Evaluation Committee will consider the population and provincial, regional, and urban/rural distribution of proposed projects. Recommendations will be made on a priority basis. All funding decisions will be made by UBCM.

Application materials may be shared with the Province of BC.
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7. Grant Management and Applicant Responsibilities

Grants are awarded to eligible applicants only. The applicant is responsible for completion of the project as approved and for meeting reporting requirements.

Approved applicants are responsible for proper fiscal management, including maintaining acceptable accounting records for the project. UBCM reserves the right to audit these records.

Notice of Funding Decision

All applicants will receive written notice of the funding decision. Approved applicants will receive an Approval Agreement, which will include the terms and conditions of any grant that is awarded, and that is required to be signed and returned to UBCM within 30 days.

Grants are paid out after the completion of the project and only when the final report requirements have been met.

Please note that in cases where revisions are required to an application, or an application has been approved in principle only, the applicant has 30 days from the date of the written notice of the status of the application to complete the application requirements. Applications that are not completed within 30 days may be closed.

Changes to Approved Projects (Amendment Requests)

Approved grants are specific to the project as identified in the approved application, and grant funds are not transferable to other projects. Generally speaking, this means funds cannot be transferred to an activity that was not included in the approved application or to a new or expanded location.

Approval from UBCM and/or the Evaluation Committee will be required for any variation from the approved project. Depending on the complexity of the proposed amendment, requests may take up to 90 days to review.

To propose changes to an approved project, applicants are required to submit the [Interim Report Form](#). If UBCM determines the amendment is eligible for consideration, applicants will be required to submit:

- Amended application package, including updated, Application Worksheet, detailed budget (applicants are encouraged to use the new [LGPS Budget and Financial Summary Tool](#)) required attachments, and an updated local government Council or Board resolution;
- Written rationale for proposed changes to activities and/or expenditures.

Applicants are responsible for any costs above the approved grant unless a revised application is submitted and approved prior to work being undertaken.

Extensions to Project End Date

All approved activities are required to be completed within the time frame identified in the Approval Agreement and all extensions beyond this date must be requested in writing and be approved by UBCM. The [Interim Report Form](#) will be required to be submitted for all extension requests over six months. Extensions will not exceed one year from the date of the original Final Report deadline.

8. Final Report Requirements and Process

All funded activities must be completed within one year of notification of funding approval and the Final Report will be due within 30 days of project completion.

Final Reports

Applicants are required to submit an electronic copy of the completed final report, including the following:

- Completed Final Report Form;
- Detailed financial summary that indicates actual expenditures from the Asset Management Planning grant and other sources (if applicable) and that aligns with the actual activities outlined in the Final Report Form. Applicants are encouraged to use the new [LGPS Budget and Financial Summary Tool](#);
- Copies of any plans or documents that were developed or updated as part of the funded project.

Submission of Final Reports

Reports should be submitted as Word, Excel, or PDF files. Total file size for email attachments cannot exceed 20 MB. All reports should be submitted to Local Government Program Services, Union of BC Municipalities by email: lgps@ubcm.ca.

All final reports will be shared with the Province of BC.

Review of Final Reports

UBCM will perform a review of all final reports to ensure the required report elements have been submitted.

9. Additional Information

For enquiries regarding applications or the program, contact UBCM at lgps@ubcm.ca or 604-270-8226 ext. 220.

In addition, the following resources are recommended to assist local governments advance asset management within their organizations. These will help guide communities through the stages of ongoing asset management practice: assessment, planning, and implementation.

Asset Management for Sustainable Service Delivery: A BC Framework, 2019

Designed to reflect best practices and with the diversity of BC's communities in mind, the [Framework](#) establishes a high-level, systematic approach that supports local governments in moving toward service, asset, and financial sustainability through an asset management process. The Framework is dedicated to helping local governments understand what asset management is, why it is important, and how it can be implemented.

The Framework has been approved as a key reference document providing guidance to local governments on meeting their asset management commitments under the Canada Community-Building Fund. The following tools support implementation of the Framework. All are available on the [Asset Management BC website](#).

- Asset Management Roadmap
- AssetSmart
- Asset Management Policy Template
- Asset Management Policy Model Bylaw
- National Asset Management Strategy (NAMS)
- International Infrastructure Management Manual (IIMM)
- ISO 55000

Other Funding Programs

The following funding programs offer complementary resources supporting asset management:

- [Canada Community-Building Fund: Community Works Fund – Capacity Building](#)
- [BC Ministry of Municipal Affairs: Infrastructure Planning Grant Program](#)

Appendix 1: LGPS Online Application Tool

As outlined in Section 6, Applications are required to be submitted in two steps:

1. [LGPS Online Application Form](#): This online form must be completed for all applications to LGPS funding programs and includes questions that are common to all grant applications. When the LGPS Online Application Form is submitted, the applicant will receive an email confirmation including the file number that has been assigned to the application, and a copy of the Application Worksheet that must be completed as part of Step 2.
2. Application Worksheet and required attachments: This worksheet contains questions that are specific to the funding stream and must be submitted by email to UBCM with all other required attachments.

STEP ONE: LGPS Online Application Form

The following questions are required to be answered on the LGPS Online Application Form:

1. Name of the intake of the funding program that you want to apply for (select from menu)
2. Name of Applicant (select from menu). Please note: if the name of your organization is not included in the menu, contact UBCM in order to determine eligibility and next steps.
3. Primary and secondary contact person: name, position, phone, email
4. Project title
5. Proposed start and end date
6. Total project budget
7. Total grant request
8. Other funding amount and source
9. Project summary
10. Progress to date. Provide an update on the status of previously approved projects if previously funded under same funding program/funding stream
11. Certification that information is complete and accurate

When the LGPS Online Application Form is submitted, the applicant will receive an email confirmation including the file number that has been assigned to the application, and a copy of the Application Worksheet that must be completed as part of Step 2.

STEP TWO: Application Worksheet and Required Attachments

Application Worksheet

The following questions will be required to be answered on the Application Worksheet:

SECTION 1: Applicant Information

1. Name of Applicant (local government).
2. File Number (this can be found on the confirmation email you will receive after the LGPS Online Application Form is submitted).

SECTION 2: Eligibility Requirements

3. Is this project also funded through FCM's Municipal Asset Management Program?
4. Current status of asset management expertise (based on self-assessment), description of current level of asset management expertise.

SECTION 3: Detailed Project Information

5. Proposed Activities: description of the proposed specific activities that will be undertaken (i.e., baseline assessment, asset management policy, asset management plan, training, etc.)
6. Progress to Date: have you previously received funding under the Asset Management Planning program, or through the Canada Community-Building Fund. If so, please provide an update on the outcomes of those funded projects or a summary of progress to date.
7. Intended Outcomes, Deliverables and Impacts on Local Government: what will your project achieve? What will be the specific deliverables? List any policies, practices, plans, or local government documents that will be developed or amended as a result of your project.
8. Additional Information: any other information you think may help support your submission.

SECTION 4: Required Attachments

The following attachments will be required to be submitted with the completed Application Worksheet:

- Council/Board Resolution indicating support for the current proposed activities and willingness to provide overall grant management.
- Detailed budget that indicates the proposed expenditures and aligns with the proposed activities outlined in the Application Worksheet. Although additional funding or support is not required, any other grant funding or in-kind contributions must be identified. Applicants are encouraged to use the new [LGPS Budget and Financial Summary Tool](#).
- For eligible projects that are also funded through FCM, the complete MAMP application package and notice of funding approval from FCM is required to be submitted.

Documents should be submitted as Word, Excel, or PDF files. Total file size for email attachments cannot exceed 20 MB.

All documents should be submitted to Local Government Program Services, Union of BC Municipalities by e-mail: lgps@ubcm.ca

Please note "2024 Asset Management" in the subject line.