

Asset Management Planning Program

2025 Program and Application Guide

Funding permitting, applications will be accepted until May 23, 2025 using the [LGPS Online Application Tool](#)

1. Introduction

Background

The Asset Management Planning program was created in 2014 through a \$1.5 million contribution from the Ministry of Municipal Affairs. Since that time, more than \$6.3 million has been contributed to the program for planning grants, training subsidies, and the development of asset management resources, and more than 380 grants and subsidies have been awarded.

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.

Please refer to [Appendix 1](#) for definitions of terms used in this guide. All defined terms are in **bold** in the program guide.

Asset Management Planning Program

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.

Matching grants of up to \$25,000 are available under the 2025 Asset Management Planning program to assist local governments in delivering sustainable services by extending and deepening asset management practices within their organizations, recognizing their size, complexity, current status, and individual needs.

2. Eligible Applicants

All local governments (municipalities, regional districts, and the Islands Trust) in BC are eligible to apply. Eligible applicants can submit one application per funding stream intake.

3. Grant Maximum

The 2025 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;
- Strategic Priorities Fund;
- Third-party contribution; and/or
- Other grant funding.

The Evaluation Committee may recommend that an application be approved in part, based on available funding and the merit of the proposed project.

To ensure transparency and accountability in the expenditure of public funds, all other financial contributions for eligible portions of the project must be declared and, depending on the total value, may decrease the value of the grant. This includes any other grant funding and any revenue that is generated from activities that are funded by the Asset Management Planning program.

4. Eligible Projects

To qualify for funding, proposed activities must assist local governments in delivering sustainable services by extending and deepening asset management practices within their organizations. Refer to [Appendix 2](#) for additional resources.

In addition, to qualify for funding, projects must be:

- A new or a subsequent phase of a project (retroactive funding is not available); and
- Capable of completion by the applicant within one year of the date of grant approval.

5. Requirements for Funding

As part of both the development of the application package and the delivery of the **approved project**, local governments are encouraged to proactively engage with local First Nations and Indigenous organizations, such as Friendship Centres and Métis Chartered Communities. Engagement by local governments both locally and regionally can help build relationships with First Nations, benefit both communities, and enhance reconciliation. More information on engagement best practices is available [here](#).

As part of the Approval Agreement, approved applicants must agree to the following requirements for funding:

- Activities must comply with all applicable privacy legislation under the *Freedom of Information and Protection of Privacy Act* in relation to the collection, use, or disclosure of personal information while conducting funded activities. Personal information is any recorded information about an identifiable individual other than their business contact information. This includes information that can be used to identify an individual through association or inference.
- Where applicable, the Qualified Professionals that manage the proposed project must be subject matter experts and any professional activities must be developed and signed by a qualified professional as per the *Professional Governance Act*.

6. 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.

Table 1 identifies examples of activities that are eligible for funding. Other activities that support the intent of the program may be considered for funding. Eligible activities must be cost-effective.

Table 1: Activities Eligible for Funding
1. Assessing
<ul style="list-style-type: none"> • Organizational/corporate capacity assessments • Risk assessments • <u>Initial</u> inventory, condition, and replacement cost assessments
2. 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"> ◦ i.e. Condition Assessment Framework or Level of Service Framework • Development of an Asset Management Strategy • Development of a Long-Term Financial Plan
3. Implementing
<ul style="list-style-type: none"> • Providing Asset Management Training/Education • Outcome reporting • Performance measurement

Additional Eligible Costs and Activities

The following expenditures are also eligible provided they relate directly to the eligible activities identified in Table 1:

- Incremental applicant staff and administration costs (e.g., creating a new position or adding new responsibilities to an existing position). Eligible expenses include wages/salary, mandatory employment related costs as required by federal or provincial law, and other employment related costs as required by the approved applicant.
- Consultant/contractor costs. Please note: if you intend to hire a qualified professional to support proposed activities, professional consultant rates will only be considered for activities that represent respective professions. For other activities (e.g. planning events) consultant rates are expected to be commensurate with the type of activity being undertaken; and
- Presentation to Council or Board.
- Public information costs (e.g., workshops, printed materials) that align with the intent of the funding stream and provide benefit to the community at large.

Ineligible Costs and Activities

Any activity that is not outlined in Table 1 or the 'Additional Eligible Costs and Activities' section is not eligible for grant funding. This includes:

- Development or update of feasibility studies;
- Routine or ongoing operating costs or activities (e.g., heating, cooling, and lighting; security; software licenses or service subscriptions; or membership fees).
- Routine or ongoing planning costs or planning activities (e.g. updating initial inventory, condition, and/or replacement cost assessments);
- Major capital improvements to existing facilities and/or construction of new, permanent facilities;

- Long-term, permanent capital investments including the purchase of land and/or buildings; and
- Capital costs (including computer hardware).

7. Application Requirements and Process

The [LGPS Online Application Tool](#) is required to be used. Refer to [Appendix 3](#) for full information.

Application Deadline

The application deadline is May 23, 2025. Applicants will be advised of the status of their applications within 60 days of the application deadline.

Required Application Contents

Applicants have the option to submit a local government resolution **OR** a letter of support from the CAO or CFO for applications that request less than \$50,000 in funding.

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

- Completed Application Worksheet with all required attachments;
- Local government resolution **OR** a letter of support from the CAO or CFO for applications that request less than \$50,000 in funding. Resolutions and letters need to indicate 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 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 [LGPS Budget and Financial Summary Tool](#);

Submission of Application

Applications are required to be submitted in two steps prior to the application deadline:

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.

Refer to [Appendix 3](#) for more information on the process 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 email: lgps@ubcm.ca.

Review of Applications

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

As required, the Evaluation Committee will assess and score all eligible applications. 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.

Higher application review scores will be given to projects that:

- Support the improvement and maturity of critical **asset management** practices within the organization;
- Align with the intent of the Asset Management Framework, supporting one or more of the following:
 - Assessing:
 - Organizational/corporate capacity assessments
 - Risk assessments
 - Initial Inventory, condition, and replacement cost assessments
 - Planning:
 - Development of **asset management** policies, plans, plan components, and/or strategies
 - Development of a long-term financial plan
 - Implementing:
 - **Asset management** training/education
 - Outcome reporting
 - Performance measurement
- Include activities that 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 in BC;
- Include in-kind or cash contributions to the project from the eligible applicant, regional partners, or other grant funding;
- Are cost-effective; and
- Were not funded as part of previous Asset Management Planning program intake(s);

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

All application materials will be shared with the Province of BC.

8. Grant Management and Applicant Responsibilities

Grants are awarded to approved applicants only. The approved 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 and Payments

All applicants will receive written notice of funding decisions. Approved applicants will receive an Approval Agreement, which will include the terms and conditions of any grant that is awarded. The Approval Agreement 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**, approved 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 [LGPS Budget and Financial Summary Tool](#)), required attachments, and an updated 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 extensions request over 6 months. Extensions will not exceed one year from the date of the original final report deadline.

Recognition of Funding and Funders

Approved applicants should contact UBCM for more information on recognizing funding. Please contact lgps@ubcm.ca or (604) 270-8226 ext. 220. Guidelines on using BC logos, including downloadable files, are available [here](#).

9. Final Report Requirements and Process

All funded activities must be completed within one year of notification of funding approval and the final report is due within 30 days of project completion.

Final Reports

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

- Completed Final Report Form with all required attachments;
- Detailed financial summary that indicates the actual expenditures from the Asset Management Planning program funding and other sources (if applicable) and that aligns with the actual activities outlined in the final report form. Applicants are encouraged to use the [LGPS Budget and Financial Summary Tool](#);

- Examples of any materials produced with grant funding;
- Photos of funded activities and/or completed projects; and
- Links to media related to the funded project.

Submission of 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.

Review of Final Reports

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

All final report materials will be shared with the Province of BC.
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10. Additional Information

Union of BC Municipalities

Email: lgps@ubcm.ca

Phone: 604-270-8226 ext. 220

Appendix 1: Definitions

Approved Project: Activities included in the approved application and costs included in the approved budget.

Asset management: 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.

Cash Contribution: Direct costs properly and reasonably incurred and paid for with money by the approved applicant as part of the approved project. For example, catering and consultant fees can be cash expenditures.

Community Contribution: Some LGPS programs require cost-sharing. The community contribution is the portion of the approved project cost that is required to be provided by the approved applicant. This can be in cash or in-kind but must be an eligible expenditure. LGPS programs do not have stacking rules in regard to other funding sources.

In-Kind Contribution: The use of resources of the approved applicant for the development or implementation of the approved project. For example, the use of meeting rooms owned by the approved applicant can be an in-kind expenditure.

Appendix 2: Resources

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 [Asset Management BC website](#) hosts several 'Primer' documents and the AMBC Framework, as well as links to [resources](#) on policies, templates, and industry case studies, to assist with asset management best practices.

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 3: LGPS Online Application Tool

As outlined in [Section 7](#) above, applications are required to be submitted in two steps **prior to the application deadline**:

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 information: 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 the 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. Current status of asset management expertise (based on self-assessment), description of current level of asset management expertise.

SECTION 3: Detailed Project Information

4. Proposed Activities: Please describe the specific activities that will be undertaken as part of the proposed project. Refer to Section 6 of the *Program and Application Guide* for eligibility.
 - a) Assessing (organizational/corporate capacity assessments, risk assessments, initial inventory, initial condition, and replacement cost assessments)
 - b) Planning (development of AM policies, plans, plan components and/or strategies, development of a long-term financial plan)
 - c) Implementing (AM training/education, outcome reporting, performance measurement)
5. 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.
6. Alignment with funding stream: describe how your activities align with the intent of the Asset Management Planning program to assist local governments in delivering sustainable services by extending and deepening asset management practices within their organizations, recognizing their size, complexity, current status, and individual needs.
7. Additional Information: any other information you think may help support your submission.

Required Attachments

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

- Local government resolution **OR** a letter of support from the CAO or CFO for applications that request less than \$50,000 in funding. Resolutions and letters need to indicate support for the current proposed activities and willingness to provide overall grant management.
- Detailed budget that indicates the proposed expenditures from the Asset Management Planning program 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 [LGPS Budget and Financial Summary Tool](#);

**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 email: lgps@ubcm.ca**

Please note “2025 Asset Management Planning” in the subject line.