



Starting the conversation about asset management: **Facilitator's guide**



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Let's start the conversation about **asset management!**

In the **Starting the Conversation Toolkit**:

- This **facilitator's guide**
- A **facilitator's worksheet**
- Two template slide presentations—**Template 1 – Getting started** & **Template 2 – Going deeper**, with speaking notes

The toolkit is designed to enable asset management champions—like you!—to develop and deliver an engaging presentation to municipal council that will encourage long-term support for good asset management practices that support sustainable service delivery.

Who's an Asset Management champion?

Elected officials, municipal staff, local businesses, community leaders and environmental stewards... We can all be Asset Management champions!

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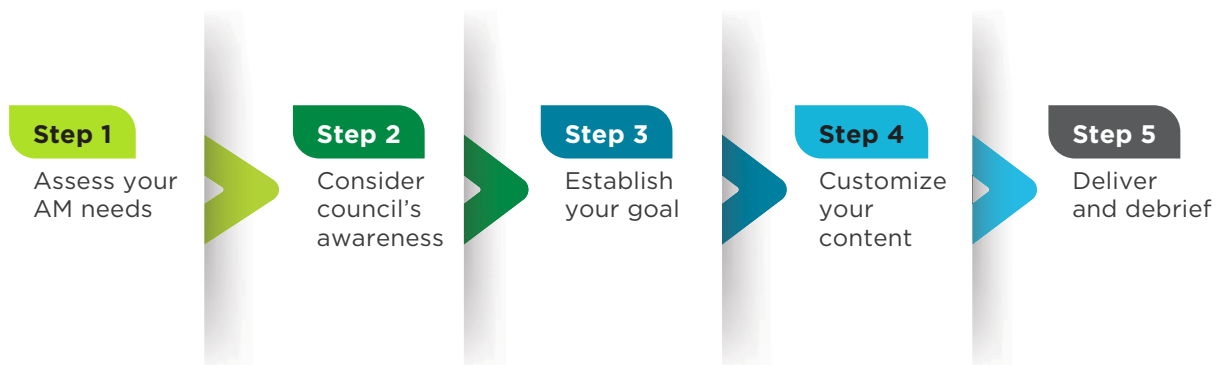
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How to use this guide

Asset management is critical to the long-term success and sustainability of your community. This guide will help you assess your municipality's asset management needs and consider your council's level of awareness. It offers strategies for identifying the goal of your presentation and pinpointing your key messages. Apply what you learn to select and revise the slides from the toolkit's templates, adding local context. Finally, deliver an engaging presentation showing how **your community runs on asset management!**

"START THE CONVERSATION" IN 5 STEPS:



As you complete each step, consider the following:

- What are your community's current and anticipated asset management needs?
- What level of detail is suitable to engage your audience?
- How can you get the most out of this toolkit to build your presentation?
- How will you communicate asset management effectively to council?
- What next steps will advance your community along its asset management journey?



Tip! The Facilitator's Worksheet that accompanies this guide includes examples to help you reflect on key questions to consider while preparing your presentation. Jot down your notes in the worksheet, as you follow the steps in the guide.

STEP 1

Assess your asset management needs

To start preparing your presentation, first consider your municipality's current asset management needs and the factors that inform good asset management practices.

Some key questions to consider during this step include:

- a. What **services** does your municipality deliver and who relies on them?
- b. What is the **historical and environmental context** of the physical location of your assets?
- c. What **assets** do you rely on to deliver these services and how are these assets currently managed?
- d. How might **changes**, such as shifts in population demographics, changes in land use or climate change, impact your municipality's assets moving forward?

This step will help you identify which discussions you need to have with council and determine what background information will be required.



Tip! Find examples in the **Facilitator's Worksheet** and jot down your notes & reflections. You may not have *all* the information yet. That's ok! Focus on a single asset class or service type to begin with—the worksheet uses **transportation services** as an example.

Researching to fill the gaps (finding sources, asking experts, gathering and analyzing information) could be your first step after your presentation.

STEP 2

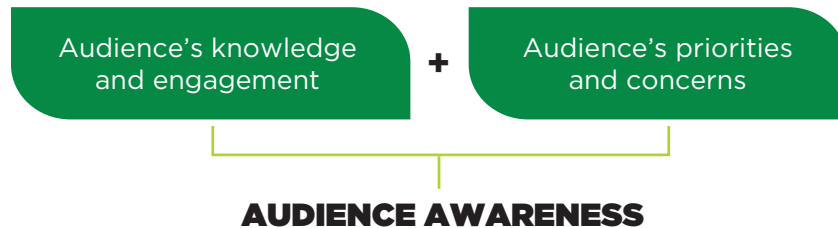
Consider council's awareness

The second step in preparing your presentation is to assess your audience's current knowledge and engagement level with asset management. This will help you tailor your presentation to their interests and concerns and ensure your message resonates with them.

Some key questions to consider during this step include:

- a. What is **your audience's** current **understanding of and engagement** with asset management?
- b. What are their current **priorities and concerns**, and how do these relate to asset management?

Assessing council's current engagement level will provide a basis for identifying the asset management topics to include in your presentation and at what level of detail.



Tip! Find examples in the **Facilitator's Worksheet** and jot down your notes and reflections.

STEP 3

Establish your goal

Now that you have identified your asset management needs and reflected on your council's awareness, priorities and potential concerns, you can establish what you want to achieve with your presentation.

Some key questions to consider during this step include:

- a. What **key message** do you want your audience to take away from the presentation?
- b. What **decision or recommendation** is expected from the audience based on the presentation?
- c. What **steps** will you want council to take after the presentation?

Establishing your goal will help you select the most appropriate messages and engage your audience towards the best possible outcomes.



Tip! Find examples in the **Facilitator's Worksheet** and jot down your notes and reflections. Look ahead to Step 5 "Once the dust settles," for a list of possible next steps that can help inform your goal.

STEP 4

Customize your content

Drawing on what you've learned so far, you can build an engaging and informative presentation. In this step, you will choose a presentation template, select your slides and customize them to include information and examples from your community. You can tailor the presentation to suit your local context by removing or adding information. Add visual aids such as infographics and local images that convey your message.

Choose
a template

+

Select
your slides

+

Customize

CHOOSE A TEMPLATE:

To help you get started, the toolkit includes **two template presentations**. The **templates** include **speaking notes** and other helpful tips. When deciding which template to use, consider the purpose and goals of your presentation, as well as your council's current level of engagement with asset management.



Template 1

Getting started

Asset management in 10 minutes

Use template 1 if...

- You have limited time to present (approx. 10-15 min)
- Some or all of council is new to asset management.
- Your municipality is beginning its asset management journey.



Template 2

Going deeper

Advanced concepts and examples

Use template 2 if...

- You have more time to present (approx. 30-40 min).
- Your council is familiar with asset management or is highly technical.
- You are presenting during a smaller committee meeting or as part of workshop.
- Your council has been asking about or is interested in specific asset management topics.

SELECT YOUR SLIDES:





Once you've chosen the presentation template that best suits your circumstances, review the slides and accompanying notes. To help guide your messaging, both templates include 4 types of slides: Inform, Key message, Engage, Example. Aside from the title and start up slides, those with a dark green background present overall topics and slides with a white background offer greater detail.

Start by selecting your Key Message and Information slides before completing your presentation with Engagement and Example slides.

As you select slides from the template, **consider the purpose** of each one:

- a. What do you want the slide to achieve?
- b. How does it support the overall goal and message of your presentation?

Look for these icons in the corner of the slides to help you craft a more powerful message:

Inform	Key message	Engage	Example
			
Provide factual information	Takeaways	Capture council's attention	Tangible scenarios
<ul style="list-style-type: none">• Inform slides provide information about asset management, such as facts, statistics, data, and definitions.• Inform slides can be useful for setting the context of your presentation.	<ul style="list-style-type: none">• Key message slides deliver and reinforce key messages.• They include concise breakdowns and key takeaways.	<ul style="list-style-type: none">• Engagement slides grab council's attention, provide opportunities for interaction, or prompt reflection.• Engagement slides include icebreaker activities, discussion/reflection questions, and deeper dives into specific topics.	<ul style="list-style-type: none">• Example slides provide concrete examples of asset management in action, related to the local context.• These include case studies, success stories, and before-and-after photos.



Tip! Start with the “Inform” and “Key Message” slides that are most important to your presentation. Then choose the “Engage” and “Example” slides that will best complement the information.

FEATURE LOCAL CONTEXT:

The presentation templates include **case study scenarios**—examples that illustrate key concepts and themes in asset management including levels of service, sustainability, inclusive thinking, planning and collaboration.

Asset management will be more tangible, relevant, and applicable for your audience if you incorporate details that are specific to your community's needs and priorities.

When **designing and adding your own case studies**, some key questions to consider include:

- a. What happened?
- b. How did the municipality respond?
- c. What opportunities are there to improve asset management planning?
- d. What was the lesson learned?
- e. What photo or graphic can be added to the slide to enhance the message?

An evocative example of your community demonstrating effective AM practices may resonate best with your audience.



Tip! Find an example in the **Facilitator's Worksheet** and jot down your notes and reflections.

STEP 5

Deliver and debrief

You're almost ready to deliver your presentation and wow your audience with a compelling case for solid asset management practices!

Before you present, take a moment to go over the pointers below.

A good debrief **after you present** will help you not only perfect your presentation skills but also identify what further questions you need to ask or actions you need to take to keep the conversation with council going.

Remember that with each election, new council members may need to be introduced to asset management—refining your presentation now can be useful for later.



BEFORE YOU PRESENT:

- **Cater your presentation format:** Are you presenting in person, virtually or hybrid (both in person and online)? If you're delivering a virtual or hybrid presentation, consider presenting with someone who can monitor the "chat" for audience questions or comments and manage any technical issues.
- **Organize the presentation to fit your style:** Review the slides and notes in "presentation mode" to ensure they are organized and flow in the best way for you. Nothing beats showing up looking your best!
- **Practice!** Practice delivering the presentation in front of colleagues or friends to get feedback and work out any issues with pacing or clarity and to identify areas for improvement.
- **Speak clearly and with confidence:** Speaking clearly and confidently is essential for a successful presentation. You are your community's best asset management spokesperson! Use a clear, concise speaking style, and ensure your body language and eye contact reflects your enthusiasm.

- **Anticipate questions:** Anticipate questions that the council may have and prepare answers in advance. This will help you be more confident and prepared when answering questions from council members.
- **Manage time effectively:** Time management is critical for a successful presentation. Estimated times have been provided in the slides but are not absolutes. Ensure that you can cover the key points and answer questions within the allotted time.

AFTER YOU PRESENT:

- What did the audience connect with the most (or the least)?
- What did the audience want to learn more about? Which concepts could be clearer or explained differently?
- What questions did the audience have? Were there any that surprised you?
- What can you take away from this process? What have you learned?

ONCE THE DUST SETTLES:

Finally, back in step 3, you identified some next steps that you anticipated taking after delivering your presentation. There may be new action items added, based on how your council responded to your presentation. Now is the time to get started on these!

KEEP THE ASSET MANAGEMENT MOMENTUM GOING WITH ACTIONABLE NEXT STEPS

Here are a few examples of next steps to **keep the asset management momentum going**:

- Provide interested council and other audience members a way to get involved, learn more and connect with you.
- Organize a cross-functional asset management team.
- Develop a policy or strategy to implement asset management in your municipality.
- Conduct an inventory of an asset class that is most pertinent or timely.
- Identify and participate in asset management training—and include council members!
- Engage your council in reflecting on where you are in the AM journey by completing the [Asset Management Readiness Scale](#) as a team exercise.



Tip!

- Jot down your notes and reflections in the **Facilitator's Worksheet**.
- Save your worksheet and presentation in an easy to locate folder—you may need to refer to them when you are called upon to present again.

CONGRATULATIONS!

Starting a conversation can be the most challenging part of initiating different or new ways of doing things in our organizations—including asset management.

Good asset management is a process and a practice: it brings together the many elements of planning and budgeting for municipal infrastructure needs, but it requires working together across departments and disciplines to be successful. In other words, ensuring sustainable service delivery through **asset management is an ongoing conversation!**



Useful References and Resources

- [FCM's Asset Management Resource Library](#)
- [2019 Canadian Infrastructure Report Card](#)
- [Canada's Core Public Infrastructure Survey: Interactive Dashboard](#)
- [Considering Climate Change in Levels of Service](#)
- [Climate Change in Canada | Climate Atlas of Canada](#)
- [Integrating equity, diversity and inclusion into municipal climate action](#)

