

# AMMAT Workshop

27<sup>th</sup> June 2011

# Session 1: Project & Methodology Overview



- PB Introductions
- Project Overview
  - Deliver an approach to assess asset management maturity
- Project guidelines. Must have regard to:
  - To the purpose of ID regulations & Part 4 Purpose statement
  - Logistical and cost considerations
  - Existing standards of good infrastructure asset management
  - Approaches adopted in other sectors or countries
- Stakeholder Consultation

# Session 1: Consultation



- Consultative approach – feedback from EDBs
- Stakeholder consultation consists of:
  - a pilot phase (1 EDB)
  - a workshop
  - and a trial (2 EDBs)
- Final report submitted to Commission

# Session 1: PAS 55 & PAM

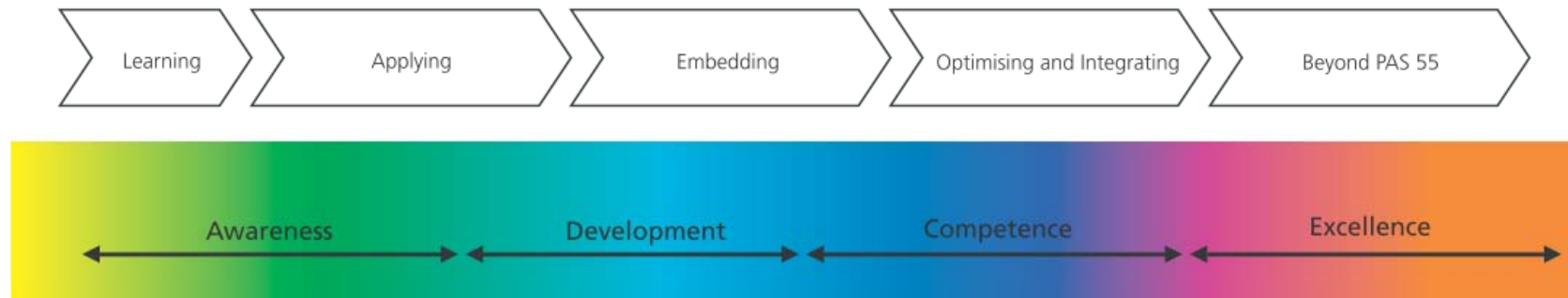


- What is PAS 55?
  - BSI PAS55:2008 distributed and supported by the Institute of Asset Management ([www.theIAM.org](http://www.theIAM.org)) UK based professional body of asset managers
  - Recognised international standard
  - PAM = Existing tool for assessing maturity
- PAS 55 Assessment Methodology (PAM)
  - Self-assessment questionnaire of 121 questions
  - Contains guidance, incorporates best practice
  - Evidence based, demonstrate capability
  - Generic, promotes continuous improvement
  - Accessible

# Session 1: AMMAT overview



- Maturity scale<sup>1</sup>



**Maturity Level 0**

The elements required by PAS 55 are not in place. The organisation is in the process of developing an understanding of PAS 55..

**Maturity Level 1**

The organisation has a basic understanding of the requirements of PAS 55. It is in the process of deciding how the elements of PAS 55 will be applied and has started to apply them.

**Maturity Level 2**

The organisation has a good understanding of PAS 55. It has decided how the elements of PAS 55 will be applied and work is progressing on implementation.

**Maturity Level 3**

All elements of PAS 55 are in place and are being applied and are integrated. Only minor inconsistencies may exist.

**Maturity Level 4**

Using processes and approaches that go beyond the requirements of PAS 55. Pushing the boundaries of Asset Management development to develop new concepts and ideas.

<sup>1</sup> Source – [www.theIAM.org](http://www.theIAM.org)

# Session 1: AMMAT overview



- Session 1 questions.
  - Does this mean we have to become PAS 55 compliant?
  - Does this mean we will have to do things in a specified way?
  - We are already working towards PAS 55 compliance!

# Session 2: Current AMP requirements



- Good results to date
- An AMP is only one component of an Asset Management System
- Having a good AMP doesn't guarantee good asset management (and vice versa)
- Minimal people focus
- Does not allow the comprehensive assessment of maturity, or capability

## Current AMP requirements

AMP summary

Background and objectives

Assets covered

Service levels

Network development planning

Lifecycle asset management planning

Risk management

Evaluation of performance

Expenditure forecasts, reconciliation and assumptions

## Session 2: Capability scope



- Why 31 questions?
  - Appropriate level, minimise burden
  - Similarity of some questions in PAM
- Why these 31 questions?
  - Cover ‘important’ areas for EDBs, PB’s opinion.
  - Cover AMS components not well documented in AMPs
- Are these new requirements?
  - No. Involves components a good asset manager should already be doing...
  - Provides means to check!!! Self-assessment.
  - And focus improvement initiatives.



## Session 2: Capability scope

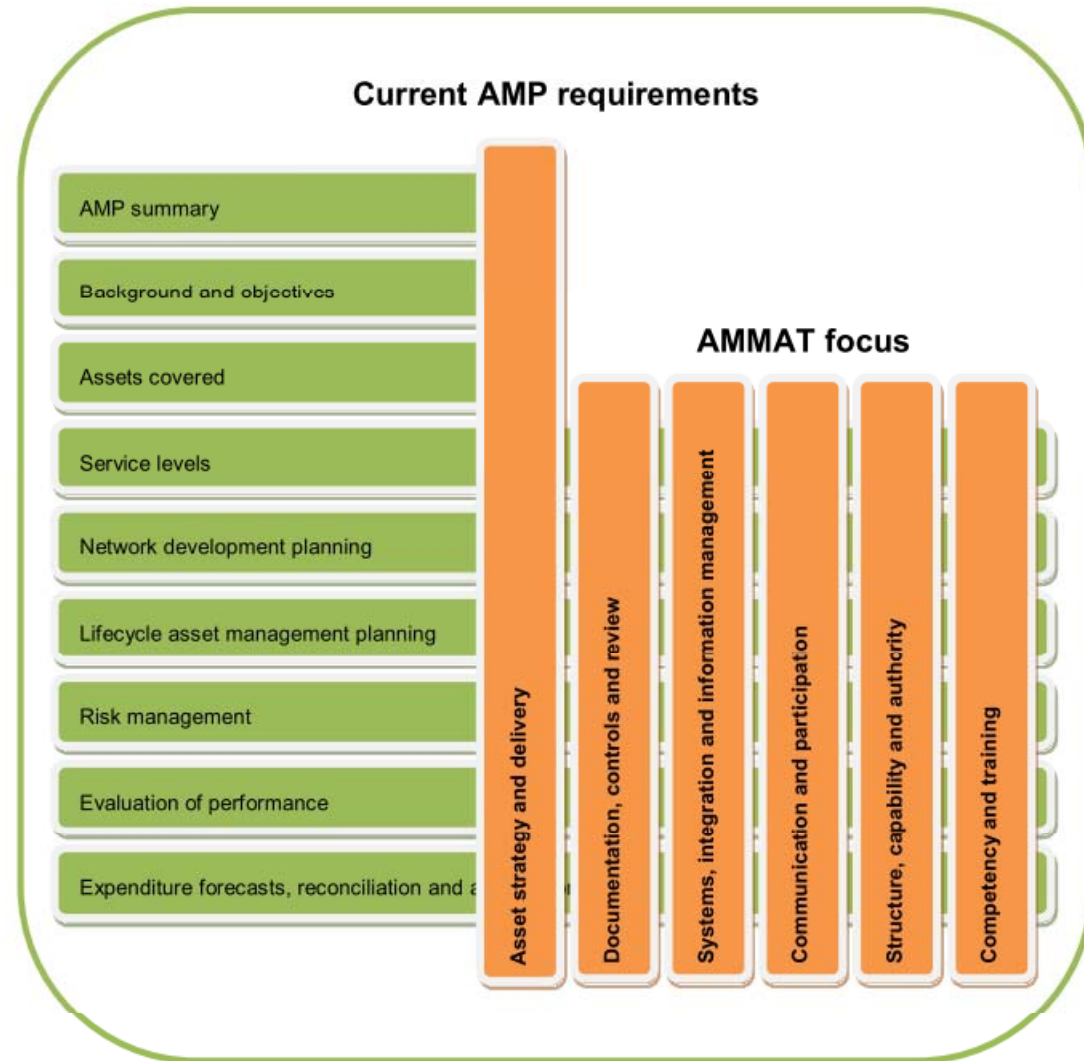


- An asset management system is made up of strategy, people, processes and systems...
- Questions grouped into 6 core assessment areas:
  - Asset strategy and delivery (STRATEGY/PROCESS)
  - Documentation, controls and review (PROCESS)
  - Systems integration and information management (PROCESS)
  - Communication and participation (PROCESS)
  - Structure, capability and authority (PEOPLE)
  - Competency and training (PEOPLE)

# Session 2: Capability scope



- Cross functional focus, for the entire Asset Management System



## Session 2: Capability scope



- Session 2 questions and issues.
  - Why not question 'x'?
  - We already cover this in our AMP.
  - Can we do all 121 questions?
  - How will we know how to improve our score?

# Session 3: AMMAT walkthrough



- Tool consists of:
  - Introduction page
  - Questions
  - Results
- Worked examples.

# Session 3: AMMAT walkthrough



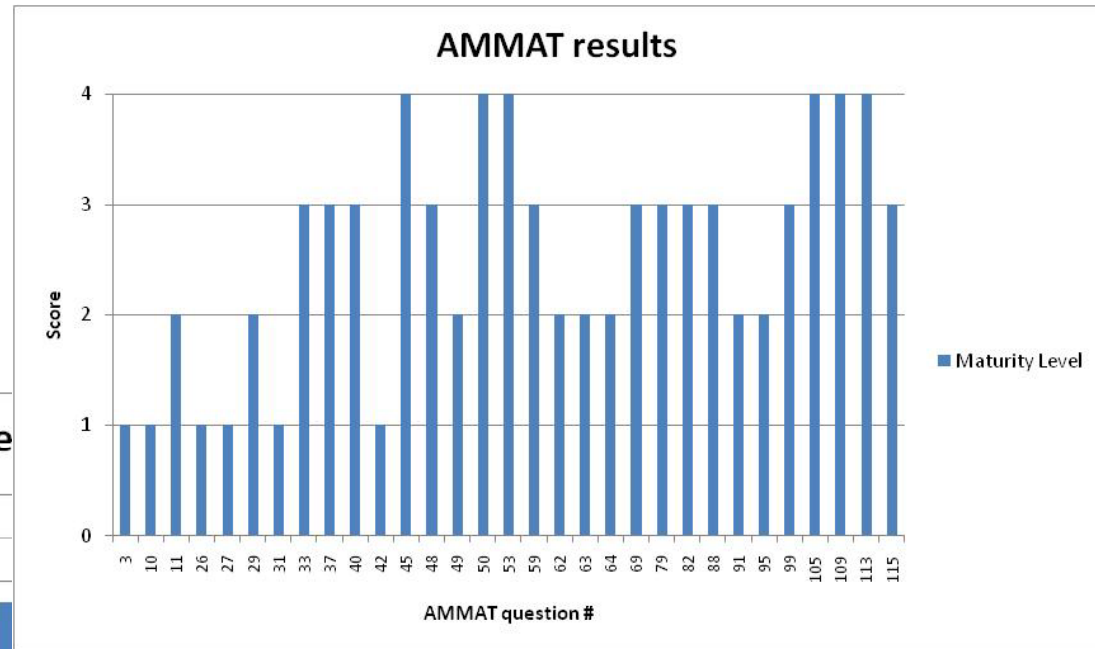
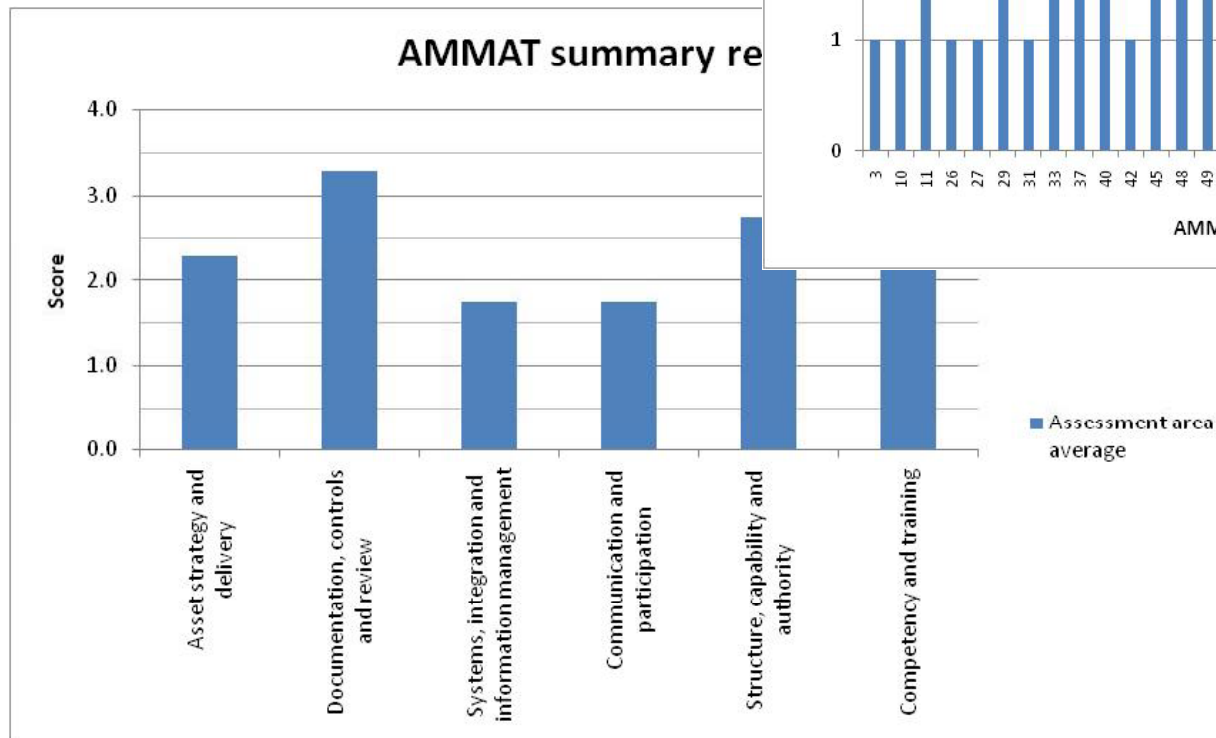
- Sample Question (95) – Performance and condition monitoring...

Question	Maturity Level 2	Maturity Level 3	Why	Who	Rec/Doc.Inf
How does the organisation measure the performance and condition of its assets?	The organisation is developing coherent asset performance monitoring linked to asset management objectives. Reactive and proactive measures are in place. Use is being made of leading indicators and analysis. Gaps and inconsistencies remain.	Consistent asset performance monitoring linked to asset management objectives is in place and universally used including reactive and proactive measures. Data quality management and review process are appropriate. Evidence of leading indicators and analysis.	PAS 55 requires that organisations establish implement and maintain procedure(s) to monitor and measure the performance and/or condition of assets and asset systems. It further sets out requirements in some detail for reactive and proactive monitoring, and leading/lagging performance indicators together with the monitoring or results to provide input to corrective actions and continual improvement. There is an expectation that performance and condition monitoring will provide input to improving asset management strategy, objectives and plan(s).	A broad cross-section of the people involved in the organisation's asset-related activities from data input to decision-makers, i.e. an end-to end assessment. This should include contactors and other relevant third parties as appropriate.	Functional policy and/or strategy documents for performance or condition monitoring and measurement. The organisation's performance monitoring frameworks, balanced scorecards etc. Evidence of the reviews of any appropriate performance indicators and the action lists resulting from these reviews. Reports and trend analysis using performance and condition information. Evidence of the use of performance and condition information shaping improvements and supporting asset management strategy, objectives and plan(s).

# Session 3: AMMAT walkthrough



- Output page



# Session 3: AMMAT walkthrough



- Session 3 questions:
  - How much information is needed?
  - What score should we aspire to?

## Session 4: Implementation



- Initial effort required to complete the AMMAT
  - then incremental.
- PB recommends inclusion as a stand alone section in the AMP:
  - The AMP is a comprehensive document but it is **not** an asset management maturity assessment tool
  - Minimal effort to include results and discuss any actions to be taken by the business following the review
  - Permits benchmarking and peer review
  - Communicates information to interested persons



