

REPORT

PREPARED FOR THE VILLAGE OF FRUITVALE

PRIORITIZATION FRAMEWORK FOR CAPITAL INFRASTRUCTURE PLANNING

URBAN
systems

304 - 1353 Ellis Street
Kelowna, BC, V1Y 1Z9

Contact: Scott Shepherd, AScT

T: 250.762.2517

F: 250.763.5266

E: sshepherd@urbansystems.ca

urbansystems.ca

Prioritization Framework for Capital Infrastructure Planning

Report

Client: Village of Fruitvale
1947 Beaver Street
Fruitvale, BC V0G 1L0

Attention: Melissa Zahn, Deputy Financial and Deputy Corporate Officer

Prepared by: Urban Systems Ltd.
304 – 1353 Ellis Street
Kelowna, BC V1Y 1Z9
Phone: (250) 762-2517



Prepared by: Scott Shepherd, AScT

Date issued: November 2016

Project No.: 1011.0050.01

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Introduction

The Village of Fruitvale (Fruitvale) is currently undertaking a multi-phase approach to sustainable service delivery. Phase 1 of their asset management plan involved completing an asset management assessment using Asset SMART and the BC Framework for Sustainable Service Delivery. The assessment gives Fruitvale an understanding of where they currently are with asset management practices and where they need to be.

Phase 2 involved developing an Asset Management Investment Plan (AMIP) which identified an annual sustainable funding level required to renew existing infrastructure as well provide a non-prioritized list of assets that need to be replaced. Phase 3 is the development of a Prioritization Framework for Capital Infrastructure Planning (Prioritization Framework). This framework enables the integration of all the relevant work completed to date to develop a list of prioritized capital projects.

The major phases of Fruitvale's asset management program are summarized below in **Figure 1**.

Figure 1 – Asset Management Program



The Village of Fruitvale retained Urban Systems Ltd., in 2016, to undertake the development of a framework for prioritizing capital projects as part of improving its budgeting and decision-making processes. By completing this project, the Village can expect the following benefits.

- ▶ The ability to leverage good information from historical investments in technical studies infrastructure master plans and other planning / engineering assessments to inform infrastructure decision-making;
- ▶ The ability to maintain important objectives (i.e. asset renewal, level of service and growth) in future infrastructure investment planning (e.g. beyond current political cycles);
- ▶ A clearly established process at the staff and council levels for establishing priorities and decision-making;
- ▶ Develop a stronger community by showing the Village of Fruitvale residents that tax dollars are being spent wisely and most efficiently;
- ▶ Demonstrate regional leadership through implementation of informed infrastructure investment decisions; and
- ▶ Reduce the likelihood of potential environmental damage through infrastructure failures thereby mitigating unplanned expenditures.

Prioritization Framework for Capital Infrastructure Planning

Infrastructure investment decisions are complex due to the multiplicity of goals, lack of clarity as to what the priorities should be, limited financial resources and need to balance the values/interests of decision-makers with the best interests of the community. As a result, infrastructure investment decisions and the prioritization of capital projects needs to be defensible, easy to understand, transparent, effective and efficient.

The Village of Fruitvale has identified a need for a defined set of processes and criteria to evaluate and prioritize competing capital projects so that projects can be identified as aligning with asset management principles (set of weighted criteria) and included in a prioritized long term capital plan.

Fruitvale’s historical capital planning process is illustrated below in **Figure 2** where projects have been prioritized based on staff judgement.

Figure 2 – Typical Capital Planning Process



In an asset management context, the development of a weighted criteria based approach to prioritization provides a defensible, consistent and transparent process for the prioritization of projects by providing a context sensitive and structured scoring hierarchy.

1.1 Methodology

The methodology utilized to develop the prioritization framework allowed for opportunities for staff to test, ground proof, refine and build their asset management capacity. There were two interactive workshops held with staff where they could build internal capacity by providing input on the framework and learning how to use the framework. The key steps in developing the framework are summarized below.

- ▶ Review of Industry Best Practice Standards
- ▶ Workshop #1 to review key projects, existing budgeting processes and develop project prioritization criteria to suit Fruitvale’s context
- ▶ Develop draft prioritization framework and model
- ▶ Workshop #2 to apply and refine prioritization framework
- ▶ Finalize documents and prioritization workbook

1.2 Technical Memorandums

The key takeaways and the prioritization framework are attached to this document as technical memorandums. The table below provides a summary of the technical memorandums.

Item	Title
Technical Memorandum #1	Best Practice Research
Technical Memorandum #2	Compiled 10 Year Project Inventory (non-prioritized for the sewer utility)
Technical Memorandum #3	Capital Project Prioritization (including the workbook)

1.3 Capital Project Prioritization Workbook

A capital project prioritization workbook was created using a set of weighted criteria to evaluate and prioritize projects. Technical Memorandum #3 includes a copy of *Capital Project Prioritization* workbook which includes a summary of how to use the workbook and describes each weighted criteria in more detail.

This workbook is intended to provide the Village with an objective tool for prioritizing capital projects based on a set of six criteria:

1. Efficiency (Payback)
2. Regulatory Requirement
3. Risk Mitigation
4. Availability of External Funding
5. Rehabilitation/Renewal
6. Alignment with Strategic Goals of Council

The six criteria listed above were developed in consultation with Village staff to ensure the local context was captured in the criteria. This workbook is not intended to replace or supersede the current project decision-making processes, but rather to add an additional level of rigor to the existing prioritization process (Figure 2). The workbook is meant to be completed for all projects which have been validated (i.e. the project scope and budget are clearly defined and the Village is confident in the information that it was based on).

APPENDIX A

Technical Memoranda

MEMORANDUM

Date: May 11, 2016
To: Melissa Zahn, Deputy Financial and Deputy Corporate Officer
cc:
From: Scott Shepherd, BA, ASCT
File: 1011.0050.01-R
Subject: Capital Project Prioritization – Technical Memo #1

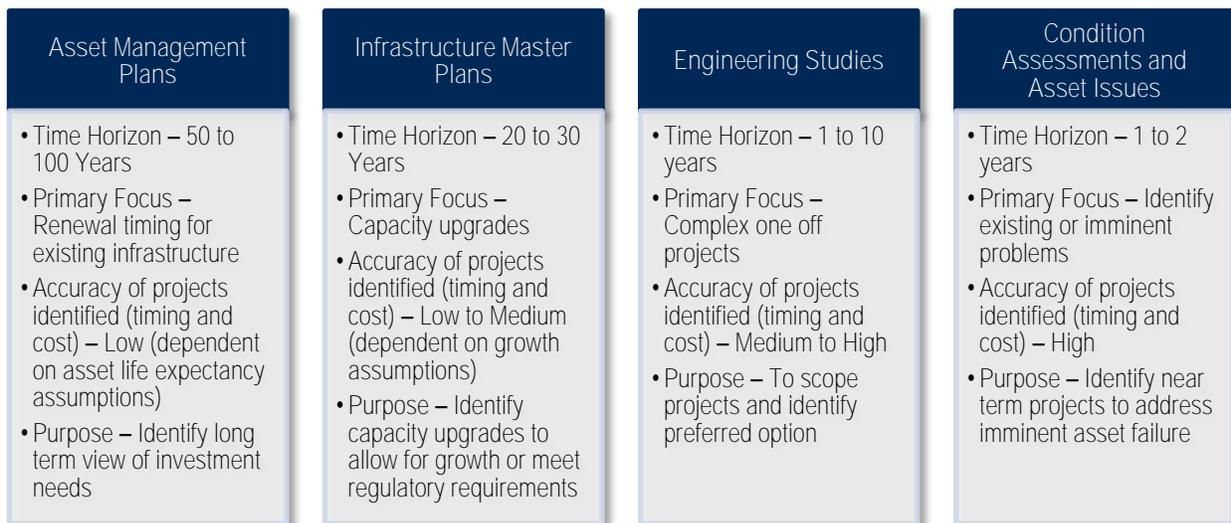
Background

Local Governments, including Fruitvale, typically produce many different types of infrastructure related information. This commonly includes asset management plans, master plans, condition assessments, feasibility studies, etc. In addition, there are projects that have been identified by staff and/or Council that are related to providing new services (or enhancing existing services) or achieving a strategic priority.

A common problem with these plans and reports is that they are often produced in isolation of each other and are not grounded in the financial constraints of the community. In addition, the information used to develop many of these plans is based on numerous assumptions and may not reflect the realities “in the field”. These plans often become “wish lists” of projects many of which never get funded.

Generally these various plans and reports have been produced for different purposes and were not intended to slot neatly into a long term capital plan. This information is summarized below in **Figure 1**.

Figure 1 – Infrastructure Information Summary



Asset management best practice provides us with a set of tools that can be used to take all of this information and prioritize it using a consistent and defensible process to produce a long term capital plan that is integrated with the long term financial plan.

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Subject: Capital Project Prioritization – Technical Memo #1
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Prioritization Framework Best Practice

Urban Systems completed a desktop review of how communities in BC conduct their capital planning and prioritization processes. The following section summarizes our review.

Infrastructure investment decisions are complex due to the multiplicity of goals, lack of clarity as to what the priorities should be, limited financial resources and need to balance the values/interests of decision-makers with the best interests of the community. As a result, infrastructure investment decisions and the prioritization of capital projects needs to be defensible, easy to understand, transparent, effective and efficient. A prioritization process is usually a key part of the capital planning process.

A typical capital planning process for communities in BC is illustrated below in **Figure 2**.

Figure 2 – Typical Capital Planning Process



There are several common approaches to the prioritization of projects. These include:

1. *Judgement based* – evaluation by a small group of staff
2. *Allocation based* – funding envelope for each service area
3. *Weighted criteria based* – fund only the highest ranked based on weighted criteria

In an asset management context, the weighted criteria based approach provides a defensible, consistent and transparent process for the prioritization of projects by providing a context sensitive and structured scoring hierarchy.

Several of the common weighted criteria utilized by communities in BC to evaluate and prioritize projects are summarized below.

- | | |
|------------------------------------|-------------------------------------|
| 1. Risk mitigation | 7. Safety |
| 2. Regulatory requirements | 8. Alignment with strategic goals |
| 3. Rehabilitation/replacement | 9. Availability of external funding |
| 4. Efficiency (payback) | 10. Bundling/phasing |
| 5. Increase to service levels | 11. Environment |
| 6. Growth and economic development | 12. Sustainability/Conservation |

The most commonly used criteria for scoring and prioritizing projects are the first six listed above and are described in more detail below.

Risk Mitigation

The project avoids or minimizes the risk to the public, the environment, or the organization. Example projects would include:

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- ▶ Proactively replacing an old water main that supplied a large portion of the community.
- ▶ Rebuilding a sidewalk that was a trip hazard to pedestrians.
- ▶ Installing traffic lights at an intersection frequently used by school children.

Regulatory Requirement

The project is required to satisfy Federal, Provincial, Regional or other jurisdiction regulatory or legal requirements. Example projects would include:

- ▶ Retrofitting of a dam as a result of complying with the new BC Dam Safety Regulation.
- ▶ Improvement to the sewage treatment plant to satisfy the requirements of the Municipal Wastewater Regulation (MWR).
- ▶ Water Quality improvements to achieve legislative changes resulting from the Drinking Water Objectives (Microbiological) for Surface Water Supplies in British Columbia.

Rehabilitation/Replacement

The project rehabilitates or replaces an existing asset where the service level is below the accepted standard and/or the cost of operating and maintaining the asset make it uneconomical. Example projects would include:

- ▶ Replacement of a sewer main that has been experiencing frequent breaks.
- ▶ Resurfacing of a road where the pavement quality was no longer acceptable.
- ▶ Replacement of a building roof system that was near the end of its useful life.

Efficiency (Payback)

The project will significantly reduce future operating or maintenance costs. Example projects would include:

- ▶ Building system upgrades to increase energy efficiency.
- ▶ Replacement of equipment that required frequent maintenance with a new technology that requires much less maintenance.

Level of Service Increase

The project will increase the existing level of service to a group of customers through the addition of **new infrastructure**. Example projects would include:

- ▶ Construction of a sidewalk on a street that previously had a gravel shoulder.
- ▶ Construction of a dedicated bike path.
- ▶ Paving of a lane or roadway that previously was gravel.

Growth/Economic Development

The project is required to allow for future growth or promote economic development. Example projects would include:

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- ▶ Upsizing of a sewer main to allow for additional development.
- ▶ Downtown revitalization project to attract businesses and tourists.
- ▶ Widening of a road to allow for densification of an existing neighbourhood

There are several variations to the weighted criteria and structured decision making processes that include different scoring/weighting systems. Based on our review, the most successful processes are easy to understand, consider local context, transparent and revise the existing capital planning process (as opposed to developing a new complicated system).

Next Steps

The next step in the project is to conduct a workshop with key decision-makers in Fruitvale to discuss the elements of project prioritization including:

- ▶ How does the current capital planning process work? Does it work well?
- ▶ How is funding currently allocated?
- ▶ Is it well understood by Council? Is it consistent and transparent?
- ▶ How projects are currently prioritized?
- ▶ How could the current process be improved?
- ▶ What are the challenges to revising the process?
- ▶ What types of prioritization criteria apply to Fruitvale?
- ▶ Are any of these more important than others?

We suggest a workshop with staff for late May or early June. Please contact the undersigned if you have any questions or require any clarification.

Sincerely,

URBAN SYSTEMS LTD.

A handwritten signature in blue ink, appearing to read "Scott Shepherd", with a long horizontal line extending to the right.

Scott Shepherd, AScT

MEMORANDUM



Date: October 3, 2016
To: Melissa Zahn, Deputy Financial and Deputy Corporate Officer
cc:
From: Scott Shepherd, BA, AScT
File: 1011.0050.01-R
Subject: Sewer Capital Project Prioritization – Technical Memo #2

Background

As part of developing and refining the capital project prioritization framework, the draft framework will be applied to a compiled list of sanitary sewer projects.

Fruitvale has various plans and reports, for its sewer system, that have been produced for different purposes and the projects/initiatives previously identified are not neatly integrated into the long term capital plan. This information includes various sewer collection system assessments, a wastewater treatment plant assessment and scoping reports including environmental impact studies, the recently completed asset management investment plan and risk assessment for the sewer collection system. The purpose of this memorandum is to document the compiled list of potential sewer related projects for evaluation and use in the prioritization framework.

The framework provides a set of tools (weighted criteria) that can be used to take all of this information and prioritize it using a consistent and defensible process to produce a long term capital plan that is integrated with the long term financial plan.

Potential Sanitary Sewer Related Projects

Urban Systems completed a desktop review of the Village's existing documents and grouped projects together that need to be completed within the next 10 years.

Project Name	Project Identification/Validation Document	Cost
UV Disinfection	Pollution Control Centre – Predesign Report	\$1,285,000
Headworks	Pollution Control Centre – Predesign Report	\$1,173,000
Secondary Treatment and Nutrient Removal	Pollution Control Centre – Predesign Report	\$4,948,000

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Date: October 3, 2016
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 Subject: Sewer Capital Project Prioritization – Technical Memo #2
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Tertiary Filtration and UV Upgrade	Pollution Control Centre – Predesign Report	\$1,954,000
200mm Sanitary Sewer Pipe Replacement -Columbia GDNS RD (san0138 & san0204)	Asset Management Investment Plan/Risk Framework	\$205,000
200mm Sanitary Sewer Pipe Replacement -Barrett Dr (san0229, san0236 & san0233)	Asset Management Investment Plan/Risk Framework	\$280,000
200mm Sanitary Sewer Pipe Replacement -Dar Lane (san0134,0135,0136,0137 & san0170)	Asset Management Investment Plan/Risk Framework	\$435,000
200mm Sanitary Sewer Pipe Replacement -Maple Ave (san0214)	Asset Management Investment Plan/Risk Framework	\$135,000
200mm Sanitary Sewer Pipe Replacement -Beaver Ave (san0216)	Asset Management Investment Plan/Risk Framework	\$56,000
200mm Sanitary Sewer Pipe Replacement -Kootenay Ave South (san0139)	Asset Management Investment Plan/Risk Framework	\$91,000

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Date: October 3, 2016
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Subject: Sewer Capital Project Prioritization – Technical Memo #2
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200mm Sanitary Sewer Pipe Replacement -Not in Roadway (san0239)	Asset Management Investment Plan/Risk Framework	\$45,000
200mm Sanitary Sewer Pipe Replacement -Not in Roadway (san0215)	Asset Management Investment Plan/Risk Framework	\$93,000
	Total	\$10,700,000

Next Steps

The next step in the project is to conduct a workshop with key decision-makers in Fruitvale to discuss and workshop through the draft framework with already identified projects to adjust and refine the framework as needed to suit the Fruitvale context.

Sincerely,

URBAN SYSTEMS LTD.

Scott Shepherd, ASCT
Principal, Asset Management Consultant

MEMORANDUM

Date: | October 3, 2016
To: | Melissa Zahn, Deputy Financial and Deputy Corporate Officer
From: | Scott Shepherd, BA, ASCT
File: | 1011.0050.01-R
Subject: | Capital Project Prioritization – Technical Memo #3

Introduction

Please find enclosed the *Capital Project Prioritization* workbook. This workbook is intended to provide the Village with an objective tool for prioritizing capital projects based on a set of six criteria:

1. Efficiency (Payback)
2. Regulatory Requirement
3. Risk Mitigation
4. Availability of External Funding
5. Rehabilitation/Renewal
6. Alignment with Strategic Goals of Council

The six criteria listed above were developed in consultation with Village staff to ensure the local context was captured in the criteria. This workbook is not intended to replace or supersede the current project decision-making processes, but rather to add an additional level of rigour to the existing prioritization process.

It is important to emphasize that it is Council that ultimately makes the final decisions with respect to the priority of projects based on recommendations from staff. This tool is meant only to serve as an *input* to that decision making process and not to replace or supersede it.

How to Use this Workbook

The workbook is meant to be completed for all projects which have been validated (i.e. the project scope and budget are clearly defined and the Village is confident in the information that it was based on).

Step 1 – Confirm that the project has been satisfactorily scoped and that the cost estimates are accurate and based on reliable information. The *Capital Planning Process Overview Diagram* contained at the beginning of the workbook illustrates how the prioritization process fits into the overall capital planning process.

Step 2 – For each validated project complete *each of* the 6 workbook criterion sections where the project may be relevant. It is important to complete each section since projects may have multiple “drivers”. Projects which score high in more than one of the criterion will receive a higher priority overall. For each of the 6 sections assign the project a score between 1 and 3 in accordance with the criteria provided. A score of 3 reflects the highest or best score and 1 the lowest.

Step 3 – Once criterion sections 1 thru 6 have been completed for the project calculate the project score as per section 7. The project score will be a 5 digit number between 00006 and 60000. The first digit in the number is a *count* of the number of criterion where the project received the highest score of 5. The

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Subject: Capital Project Prioritization – Technical Memo #3
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second digit is the number of 4's, the third digit the number of 3's, the fourth digit the number of 2's and the fifth third digit the number of 1's. The highest score possible is 60000 which would mean that the project scored a 5 for all six criterions.

Next Steps

We would like to get your comments and feedback on the workbook in its current form. We will then make any needed changes and adjustments that may be needed. The intention is to pilot the workbook as part of the 2016 budgeting process. The piloting process will allow us to evaluate how the tool performs in the "real world". We can then make any adjustments needed and finalize the workbook.

Sincerely,

URBAN SYSTEMS LTD.

A handwritten signature in blue ink, appearing to be "Scott Shepherd", with a horizontal line extending to the right.

Scott Shepherd, BA, AScT
Principal, Asset Management Consultant

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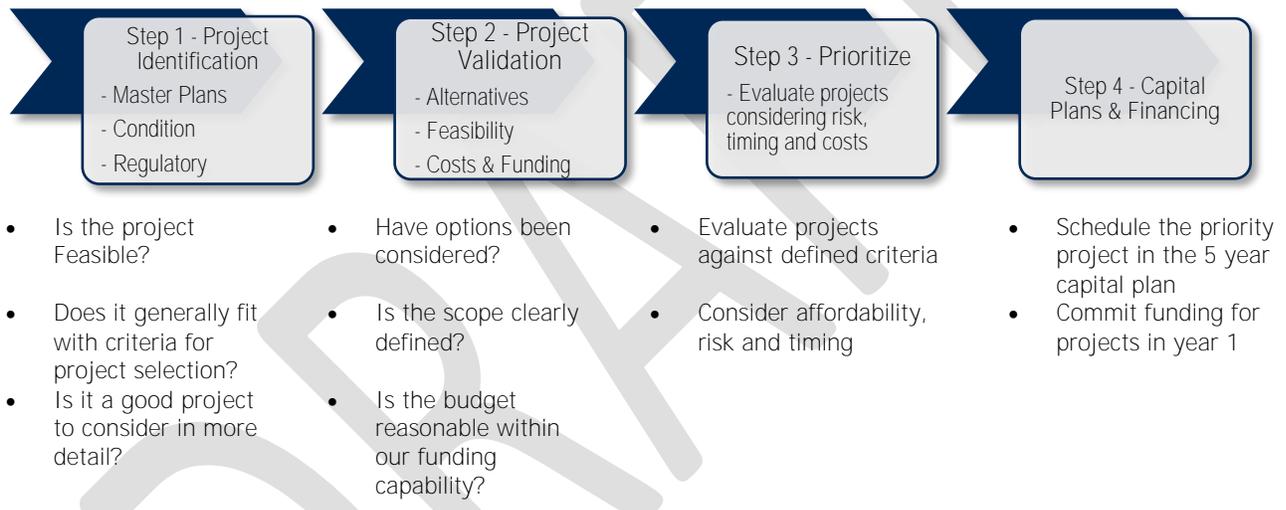


Background

Infrastructure investment decisions are complex due to the multiplicity of goals, lack of clarity as to what the priorities should be, limited financial resources and need to balance the values/interests of decision-makers with the best interests of the community. As a result, infrastructure investment decisions and the prioritization of capital projects needs to be defensible, easy to understand, transparent, effective and efficient.

Fruitvale, within its capital planning process, has adopted a weighted criteria based approach to capital project prioritization that provides a defensible, consistent and transparent process for the prioritization of projects by providing a context sensitive and structured scoring hierarchy.

Capital Planning Process Overview



Capital Project Prioritization Criteria

The criteria utilized by Fruitvale to evaluate and prioritize projects are summarized below.

1. Efficiency (Payback)
2. Regulatory Requirement
3. Risk Mitigation
4. Availability of External Funding
5. Rehabilitation/Renewal
6. Alignment with Strategic Goals of Council

The following scoring system utilizes the criteria above and is designed to be easy to understand, considers local context, transparency and revises the existing capital planning process (as opposed to developing a new complicated system).



Prioritization Scoring System

1. EFFICIENCY

Definition: The project will significantly reduce future operating or maintenance costs.

Project Examples:

- ▶ Building system upgrades to increase energy efficiency.
- ▶ Replacement of equipment that required frequent maintenance with a new technology that requires much less maintenance.

Project Scoring: Fill in the values per the tables below to determine payback.

*Total Capital Cost of the Project	A	\$	
Annual operating cost reduction	B	\$	
Annual Maintenance cost reduction	C	\$	
Total Savings (B+C)	D	\$	
Payback Period (A/D)	E		years

**including engineering and contingency*

Payback (E)	Score
1-3	5
4-7	4
8-10	3
11-15	2
15+	1

Score = _____ (max score =5)



2. REGULATORY REQUIREMENT

Definition: The project is required to satisfy Federal, Provincial, Regional or other jurisdiction regulatory or legal requirements.

Project Examples:

- Retrofitting of a dam as a result of complying with the new BC Dam Safety Regulation.
- Improvement to the sewage treatment plant to satisfy the requirements of the Municipal Wastewater Regulation (MWR).
- Water Quality improvements to achieve legislative changes resulting from the Drinking Water Objectives (Microbiological) for Surface Water Supplies in British Columbia.

Project Scoring: Evaluate the project per the tables below for influence and impact.

Level of Influence	Score (Circle one)
A regulatory requirement or order is currently in place and the Village will be likely exposed to financial penalties if the project is deferred	High
A regulatory requirement or order is currently in place however the project can reasonable be deferred with little risk of financial penalties	Medium
A regulatory requirement or order is pending in the near future	Low

Project Impact	Score (Circle one)
The project mitigates the potential for long-term or irreversible harm on the environment or public health	Significant
The project mitigates the potential for medium-term environmental impacts or potential for public injury	Moderate
The project provides minimal environmental or public health benefits	Minimal

Level of Influence	Project Impact			
	Score	Minimal	Moderate	Significant
Low		1	2	3
Medium		2	3	4
High		3	4	5

Score = _____ (max score =5)



3. RISK MITIGATION

Definition: The project avoids or minimizes the risk to the public, the environment, or the organization.

Risks are events or occurrences that will have an undesired impact on services (**Risk = Impact x Likelihood**). Some of these events will have a higher probability or greater impact than others – which make them a bigger risk. There are two types of risk in service delivery:

Asset Risk – An event where an asset failing to perform as you need it to. Examples of asset risks are a broken sewer pipe or potholed road surface.

Strategic Risk – Events or occurrences that impact your ability to achieve objectives. Examples are the possibility of reduced revenue, increase in service demands, loss of critical data/information or changing demographics.

Project Examples:

- Proactively replacing an old water main that supplied a large portion of the community.
- Rebuilding a sidewalk that was a trip hazard to pedestrians.
- Installing traffic lights at an intersection frequently used by school children.

Project Scoring: Follow the three steps below to evaluate the project.

Step 1- Evaluate the consequences of not undertaking the project as per the table below and provide a brief explanation.

Consequence Rating	1 Insignificant	2 Minor	3 Moderate	4 Major	5 Catastrophic
Public Health	Nil	First Aid	Medical Treatment	Disability	Fatality
Financial	< \$10K	\$10K - \$50K	\$50K - \$100K	\$100K - \$1M	>\$1M
Environmental	Nil	Localized short term	Wide short term	Wide long term	Irreversible long term
Service Disruption	< 4 hrs	Up to 1 day	1 day – 1 week	1 week – 1 month	> 1 Month
Reputation	Nil	Localized Complaint	Minor Media	Moderate Media	High Media

Ratings (circle one for each)

Injury	1	2	3	4	5
Financial	1	2	3	4	5
Environmental	1	2	3	4	5
Service Disruption	1	2	3	4	5
Reputation	1	2	3	4	5

Description:

Highest Consequence Rating = _____ (max score =5)



Step 2- Evaluate the likelihood of the consequence of occurring if the project does not proceed as per the table below and provide a brief explanation.

Likelihood Rating	Descriptor	Probability of occurrence	Score
Rare	May only occur in exceptional circumstances	>20 years	1
Unlikely	Could occur at some time	Within 10-20 years	2
Possible	Might occur at some time	Within 3-5 years	3
Likely	Will probably occur in most circumstances	Within 2 years	4
Almost Certain	Expected to occur in most circumstances	Within 1 year	5

Description:

Likelihood Rating Score = _____ (max score =5)

Step 3- Determine the project risk mitigation rating per the table below.

Risk Mitigation Score						
		Consequence Rating				
		Insignificant (1)	Minor (2)	Moderate (3)	Major (4)	Catastrophic (5)
Likelihood Rating	Rare (1)	1	1	2	2	2
	Unlikely (2)	1	2	2	3	3
	Possible (3)	1	2	3	4	4
	Likely (4)	1	3	4	5	5
	Almost Certain (5)	1	3	4	5	5

Score = _____ (max score =5)



4. AVAILABILITY OF EXTERNAL FUNDING

Definition: A strategic project that only proceeds by leveraging senior government financial support (*Grants are often offered to local governments by senior levels of government in response to senior government priorities. These may not always align with those of the Village of Fruitvale, which are set out by Council in response to the community's needs and aspirations*).

Project Examples:

- Replacement of existing infrastructure which is already identified in the asset management plan, risk assessment or infrastructure master plan
- Upgrading of service levels to meet regulatory requirements

Project Scoring: Evaluate the project per the tables below for the extent of the project benefit.

Project Benefit	Score (Circle one)
The project replaces existing infrastructure that has failed or failure is imminent or the project is needed to mitigate financial penalties for failing to meet regulatory obligations.	High
Asset failure or a regulatory order is imminent however the project can reasonable be deferred with little risk of financial penalties	Medium
Asset failure or a regulatory order is pending in the near future	Low

Project Impact on Finances	Score (Circle one)
The project leverages 100% financial support from senior levels government or other entities.	Significant
The project leverages 67% financial support from senior levels government or other entities.	Moderate
The project leverages 50% or less financial support from senior levels government or other entities.	Minimal

		Extent of Benefit			
		Score	Minimal	Moderate	Significant
Project Impact	Low	1	2	3	
	Medium	2	3	4	
	High	3	4	5	

Score = ____ (max score =5)



5. REHABILITATION/RENEWAL

Definition: The project rehabilitates or replaces an existing asset where the service level is below the accepted standard and/or the cost of operating and maintaining the asset make it uneconomical.

Project Examples:

- ▶ Replacement of a sewer main that has been experiencing frequent breaks.
- ▶ Resurfacing of a road where the pavement quality was no longer acceptable.
- ▶ Replacement of a building roof system that was near the end of its useful life.

Project Scoring: Evaluate the project per the tables below for the extent of the project benefit.

Project Benefit	Score (Circle one)
The asset has failed or failure is imminent and it is no longer able to provide the level of service that is required.	High
The asset is still functional however the level of service provided by the asset is below standard. Deferral of the project would likely result in unacceptable operating and maintenance expenses and/or emergency repairs	Medium
The asset is still functional however the level of service provided by the asset is below standard. The project could reasonably be deferred with only a minor impact on the operating and maintenance expenses.	Low

Extent of Benefits	Score (Circle one)
The project benefits 50% or more of community	Significant
The project directly benefits a neighborhood or greater that 5% of the Village residents	Moderate
The project directly benefits less than 5% of the Village residents	Minimal

		Extent of Benefit			
		Score	<i>Minimal</i>	<i>Moderate</i>	<i>Significant</i>
Project Benefit	<i>Low</i>	1	2	3	
	<i>Medium</i>	2	3	4	
	<i>High</i>	3	4	5	

Score = _____ (max score =5)



6. ALIGNMENT WITH STRATEGIC GOALS OF COUNCIL

Definition: The project advances the strategic directions and deliverables identified in Council’s strategic plan or in the Official community Plan (OCP).

Project Examples:

- ▶ Capacity expansion of the wastewater treatment plant to facilitate growth
- ▶ Streetscaping and corridor improvements in the downtown core to promote economic development
- ▶ Improvements to the community centre to retain and attract residents/families

Project Scoring: Evaluate the project per the tables below for the extent of the project benefit.

Project Benefit	Score (Circle one)
The project is identified in the OCP or Council’s strategic plan as a key deliverable.	High
The project is not an identified deliverable in these plans, but strongly facilitates the achievement of the community’s identified goals	Medium
The project is not an identified deliverable in these plans, but facilitates the achievement of the community’s identified goals in the long term.	Low

Extent of Benefits	Score (Circle one)
The project benefits 50% or more of community	Significant
The project directly benefits a neighborhood or greater than 5% of the Village residents	Moderate
The project directly benefits less than 5% of the Village residents	Minimal

Project Benefit	Score	Extent of Benefit		
		Minimal	Moderate	Significant
Low		1	2	3
Medium		2	3	4
High		3	4	5

Score = _____ (max score =5)



7. PROJECT SCORING

For each criteria place an x in the appropriate rating box.

Criteria	5	4	3	2	1
Efficiency (Payback)					
Regulatory Requirement					
Risk Mitigation					
External Funding					
Rehabilitation/Renewal					
Alignment with Strategic Goals of Council					
*Count of each column					

*Count the number of 5's, 4's, 3's, 2's, and 1's and record in the corresponding box

Overall Project Score = _____ (expressed as a 5 digit number between 60,000 and 00006)

DRAFT