



GETTING READY FOR ROUND 2

Preparing For Reassessment



INTRODUCTION



Bill Roth

- President & CEO of Roth IAMS
- Co-Founder of SLAM Technologies
- Over 28 years of experience collaborating with public sector institutions across North America on all aspects of facility and infrastructure asset management
- Proud Member of APPA, SRAPPA, ERAPPA and several state chapters

AGENDA



Introduction

What is Integrated Asset Management

Understand Your Current Goals

Reflect on Round #1

Get Your Data Ready

What Comes Next?

Q&A

WHAT IS INTEGRATED ASSET MANAGEMENT?





**WHERE ARE
WE FOCUSED
TODAY?**

WHY REASSESS?

- Old data in reports that are not usable
- Have not updated the data since the last assessment
- Lots of changes to the portfolio
- Evolving conditions of your portfolio



WHEN TO REASSESS?

- Industry standard is every 5 years
 - Some will try to tell you 3 years...
- When someone tells you to
 - State-level government
- In advance of a bond issuance
- New funding source becomes available
- Other reasons?





UNDERSTAND YOUR CURRENT GOALS

UNDERSTAND YOUR GOALS

- Why are you doing it?
- Who is asking us to do it?
- What questions are you trying to answer?
- How can you evolve your systems and processes through this project?
- What story are you trying to tell?



WHY YOU SHOULD DO IT



- Begin with the end in mind
- Helps define what success looks like for the program
- Get clarity and buy-in from all stakeholders



REFLECT ON ROUND #1



REFLECT ON ROUND #1

- What worked well?
- What didn't work well?
- What do you wish you had done differently?
- Did any of it not add value?



WHY YOU SHOULD DO IT?



- Learn from your past mistakes
- Firm up your scope of work
 - Anything new to add
 - ADA Checklist, Energy Checklist, Equipment Inventory, etc.
 - Remove anything from the scope of work that didn't add value last time
- Ensures that the program aligns with your goals

GET YOUR DATA READY



GET YOUR DATA READY



- Where is your previous dataset?
 - Reports – PDF or Hard Copy
 - Spreadsheets
 - Database
- Is the data up-to-date
 - Have you reconciled completed capital projects?
 - Have you added new buildings or removed buildings that were sold or demolished?

GET YOUR DATA READY

- What other background data do you need to gather?
 - Drawings
 - Updated equipment lists
 - Capital Plans
 - Other engineering reports
 - etc.



WHAT TO TAKE AWAY

- Be ready to hit the ground running
 - Have everything ready for the consultant or internal team to get started
- What is the starting point
 - Can we use the previous data?
 - Are we starting over?
 - Is it up-to-date already (will lower the cost of the future FCAs)



WHAT COMES NEXT?



WHAT COMES NEXT?



- How are we going to use the data?
- What other datasets do we need to integrate with?
 - CMMS, IWMS, ERP, etc.?
- Who needs access to the data and what access do they need?
- What tools/software are we going to use?
- How are we going to keep the data up-to-date
 - Who, how, when?



WHAT TO TAKE AWAY

- Have a plan to turn the **project** into a **program**
- Ensures that the data you get aligns with your current systems and processes
- Maximize the value of the investment that you are making



IN SUMMARY

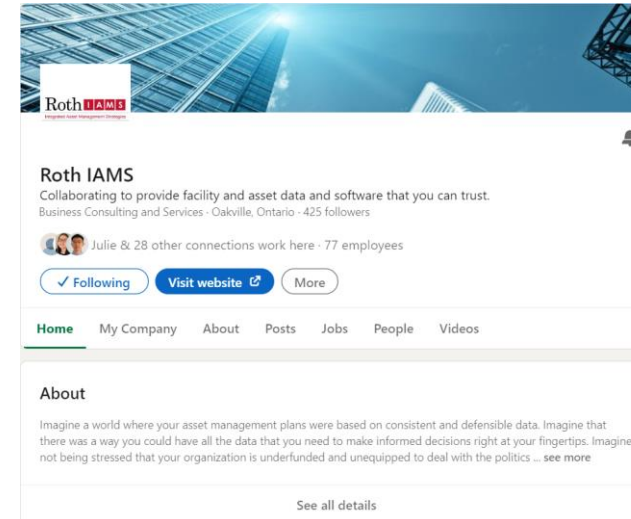
Understand	Reflect	Get Ready	What's Next
Understand Your Goals – What Has Changed Since Last Time	What Can You Do Better This Time?	Get Your Data Together and Ideally Up-to-Date	Know What You Want to Do With Your Data



Q & A

THANK YOU FOR ATTENDING

- ▶ Visit our website at rothiams.com
- ▶ Follow us on [LinkedIn](#)
- ▶ Connect with us directly through email at bill.roth@rothiams.com or call **(727) 247-9419**



Roth IAMS
Integrated Asset Management Strategies

X MENU

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**Dive Into
Our Thought
Leadership**

