



Asset Management Association of Canada

Initiative Development Handbook

Connect, Learn, **Contribute**

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Why Develop Initiatives at PEMAC?

PEMAC is a member-driven association that is a *Canadian Leader in Asset Management*. The membership of PEMAC includes representation from a range of industries, professional backgrounds, and sectors. This diversity of membership ensures excellence and leading-edge knowledge and practice-based production due to the collaborative and innovative thinking that happens when professionals from a range of backgrounds and experiences work together. One volunteer describes what motivates them to engage with PEMAC,

“I like to learn a lot and am exposed to leading practices which can be shared with others. The networking is valuable. There is a great opportunity for different industries to learn from each other- what may work well in one org, may just need minor tweaks to work in another organization. Innovation can happen when working together across industries.” - Nigel D’Souza, Board of Directors

When members take on a leadership role by suggesting new initiatives to advance the work of the association, the association incorporates new member knowledge and experience to its efforts of delivering excellence.

For those who are interested in learning more about PEMAC, leadership and sharing knowledge, as well as broadening the scope of available volunteer engagements, submitting an initiative suggestion can benefit PEMAC, other members who wish to contribute, and the personal and professional development relating to being an initiative leader.

In the following pages, this document will provide a reference guide to the information and steps required to see an idea go from a suggestion to potentially a PEMAC project or program.

The Executive Director (executive.director@pemac.org) and the Volunteer Engagement Specialist (volunteer_services@pemac.org) support initiative leaders through the suggestion process and into implementation.

PEMAC is as strong and diverse as its membership, so we invite members to consider making initiative suggestions.

If you are interested in learning more about the leadership role, please see:

<https://www.pemac.org/members/initiative-championcharter-development-leader>

Making an Initiative Suggestion

The opportunity for members to submit and lead the development of suggestions for new initiatives is an exclusive PEMAC member benefit. Suggestions for new initiatives build-on existing best-practices, offer opportunities for innovation, address gaps in knowledge in Maintenance, Reliability, and Asset Management, and reflect the range of backgrounds, experience-levels, industries, and sectors our membership represents.

Initiative suggestions must demonstrate direct alignment with PEMAC's mission, and Strategic Goals and Objectives. When a member wishes to submit a suggestion, they are encouraged to review, understand, and identify the Strategic Goals and Objectives that the project will meet.

If clarification of the Strategic Goals and Objectives is required by a member, the Executive Director, executive.director@pemac.org can be contacted before completing the suggestion webform at the bottom of the

Strategic Plan page <https://www.pemac.org/members/strategic-plan>

The suggestion form requests basic information that, upon submission, will be reviewed by the Executive Director and VES to ensure alignment with PEMAC's Strategic Goals and Objectives. If the Board Strategy and Performance Committee agrees that the idea is aligned and possible within PEMAC's current resources, the individual will be encouraged and assisted to develop their idea into a formal proposal.

PEMAC's Strategic Goals are,

A: Reinforce and enhance our offerings in maintenance, reliability and asset management	B: Raise awareness for the professional field of asset management	C: Grow the capacity of PEMAC to support our vision
D: Broaden community engagement through "connect, learn and contribute"	E: Set high standards for asset management excellence in Canada	

PEMAC's Strategic Objectives are,

A1: Number of offerings in the Maintenance and Reliability subject area.	B1: Advocacy - Number of presentations and articles by our members to an audience that is "outside our current box" on the topic of Asset Management and/or the relationship between MM & AM.	C1: Gross Revenue C2: Number of courses being improved each year compared to roadmap. C3: Number of new courses each year compared to roadmap. C4: Number of volunteers who participate. C5: Governance - Compliance with road mapped transition plan re "Policy Board".
D1: Retention: % of Member & Certificate renewal (previous year) D2: Participant hours in programs (not education/certification) including: MainTrain, Chapter Events, Webcasts & CPD Contributions to PEMAC.	E1: Participant-hours in PEMAC Education and Certification programs (MMP, AMP, CAMA) E2: Number of Asset Management Certifications CAMP, CTAM, CPAM, CSAM Certifications Issued.	

Suggestion Review Steps:



1. **Submission/selection:** Member submissions at <https://www.pemac.org/members/suggestion-form>
If the leader is selecting an already approved suggestion from the 'Needs Charter' list, they go to step #5.
2. **Submission acknowledgement:** Executive Director (ED) sends an email of acknowledgement describing process, likely timelines, and communication points during the process.
3. **ED Quick Review:** ED ensures that the idea aligns with PEMAC's Strategic Goals and Objectives before referring it to the Strategy and Performance Committee.
4. **Strategy Committee Decision #1:** The Strategy Committee reviews submissions and if approved, requests a Charter be Developed.
5. **Decision message issued:** VES sends email message indicating the outcome of the review and offers the role of Initiative Champion/Charter Development Leader to the member who submitted the idea. If the member does not take the role on, another member will be recruited to the role.
6. **Initiative Champion/Charter Development Leader:** Any member who takes on the Initiative Champion/Charter Development Leader will complete the volunteer engagement process with the VES and oriented to the role so that they understand the Charter Document, how to fill it out and how to lead a team of volunteers per PEMAC's standards.
7. **Charter Development Process:** The VES and Charter Development Lead will conduct a planning meeting and decide together who will join the effort to develop the charter and when. The leader submits a Volunteer Request, the Charter Development Team is recruited, the leader hosts a kick-off meeting, charter development meetings, and submits the completed document to the VES who submits it to the Board of Directors via the Strategy Committee.
8. **Board Approval:** Completed Charters reviewed again by the Strategy committee and then sent to the Board for approval. If approved, the VES will issue an email indicating the outcome to the leader and find out if they will continue to the Design and Implementation step.
9. **Design and Implementation:** If approved, the leader and charter development team are welcome to work with the VES on the design and implementation of the initiative.

Charter Development Process

The Charter is written on an Excel Spreadsheet Template that can be found in the PEMAC Volunteers MS Teams Channel in the 'Files' section. Remember: a project is a time-limited initiative with a set beginning-middle-end; whereas a program is an initiative that is ongoing.

The spreadsheet has several key areas to be completed for review including,

Tab 1: New Charter - this tab asks for

General information about the initiative:

Project #: Each new initiative suggestion is entered into a Microsoft Lists program, and a number is automatically generated by the program. This number serves as a reference for tracking the progress of the initiative.

Project name: The person who submits the initiative suggestion gives it a name on the Suggestion Form and this is included in the General Information Section

Name of champion: Is the member empowered to shepherd the initiative suggestion through the Charter Development process.

Key staff person: Each initiative suggestion, based on its alignment with PEMAC's Strategic Goals will fit into one of the staff member's portfolios. That staff person is the key staff person.

What resources are required?: A more detailed business case is in tab 2; for this field we are looking for a high-level summary of that.

Best case for potential revenue?: Also relates to the more detailed business case in tab 2; it is a high-level summary of that.

Problem-Statement: What need does this initiative suggestion fill? How do you know there is a need? Are there any empirical studies that highlight the need?

Goal Statement: What is the primary goal of the initiative and how does that align with PEMAC's Strategic plan?

Why do this initiative now and consequences of not doing it now: What makes this initiative suggestion opportune currently?

Expectations/Deliverables: What tangibles will be created via this project? Expected outcomes?

Key Process Indicators: The cells under the "y" have drop-down options which are linked to PEMAC's measurable objectives. Choose the top 5 measurable objectives that will be influenced by this initiative suggestion. In the columns B, C and D for each objective, indicate where we are today as a baseline (column B), what the planned outcome would be (column C), and what the Stretch target (column D). You may need staff input to fill in the baseline info for column B.

In-Scope/Out-of-Scope: Consider what people might wrongly assume the suggestion includes and articulate first what the suggestion is not in the Out-of-Scope field. When that is done, it is easier to fill in the In-Scope section. This section assists in preventing "scope-creep" and manages expectations.

Stakeholders: Anyone who has a stake or interest

Charter Development Team: The Initiative Champion can list the team who participated in the development of the Charter.

Tab 2: Business Case- this tab asks for

Benefits New Revenue or Saved Costs: Analysis and clarification of the assumptions that were made based on the financial case. Make some estimations based on the assumptions- are the assumptions realistic? You may have to look at a longer window. You might want to clarify if the assumptions relate to resourcing that is already budgeted for or would it require new money? What kinds of costs might be saved by this initiative suggestion?

One-Time Investment Assumptions: These might include start-up costs, development of tools and resources.

Ongoing Expense Assumptions: Estimate what costs might be ongoing

Payout or ROI: Payout speaks to how long it might take to make-back initial costs. We want to know if we put money in, what is the return?

Risk and Mitigation Plan: This section will be the analysis of potential risks to PEMAC, staff and volunteers and include methods that can be used to mitigate each risk identified.

Tab 3: Project Plan -this tab asks for

Project Plan: This can include a basic overview of the project or program's design as well as a high-level overview of steps to be taken relating to implementation.

KPI Tabs: The KPI tabs may be used after the initiative is operational for tracking the impact. During the development phase, these tabs can be ignored.

Tab 10 : Measurable Objectives: This is just a list. No action required for this tab

Concluding Thoughts:

Leading the development, design, and implementation of projects/programs for PEMAC is an excellent way to contribute to the realization of PEMAC's goals and objectives while achieving CPD hours, leadership experience and program development experience.

If you think you have the skills, time, and commitment to realize these benefits, we would love to speak to you about taking on the role of Initiative Champion/Charter Development Leader.

For more information about this role, please see: <https://www.pemac.org/members/initiative-championcharter-development-leader>