



Project  
Leaders

# Guiding Principles for Facility and Asset Management

Town of Innisfil

**Date: Wednesday March 8, 2023**



# Agenda

- Introductions
- Project Background
- Objectives
- Why Guiding Principles?
- Proposed Guiding Principles
- Next Steps

# Introductions Project Team



**Dean Plater** – Project Manager

**Gabrielle Bouchard** – Project Assistant / Engineer

**Gordon Chrystal** – Municipal Asset Management Expert

**Jake Dean** – Financial and Performance Analyst

**Nikki Balazs** – Acting Facilities Manager

**Jessica Jenkins** – Manager of Capital Engineering

**Carolina Cautillo** – Capital Planning Engineering Associate

# Objectives of this Presentation

- ✓ Familiarize council with the Innisfil Facility Master Plan project
- ✓ Present the six guiding principals recommended by the project team
- ✓ Suggest the order of the guiding principals and the implications of that order
- ✓ **Recommend that council adopt the guiding principals**

# Project Background

Objectives of  
the Facilities  
Master Plan



# Scope

The Town engaged Colliers Project Leaders to develop a Facilities Master Plan for 11 facilities that are excluded from the other Master Plans the Town has already developed.



# Project Schedule



# Why Guiding Principles?

## Guiding Principals:

Help to  
prioritize  
investments

Guide  
planning  
decisions

Consider  
community  
needs

Facilitate  
objectivity



# A Case Study: Memorial Arena, Penticton

Difficult decisions for competing interests – history and serviceability.

## Situation

Penticton underwent a similar exercise to Innisfil. Their Memorial Arena was over 80 years old and of historical significant to the community. However, the size was no longer suitable for modern hockey, and the replacement value was lower than the cost of upkeep.

## Ranking

Penticton ranked preserving heritage low in their guiding principals, and sustainable services high.

## Result

It was recommended that the town demolish their two underperforming arenas and build a new, modern arena. Elements of the historical memorial arena can be integrated into the new facility.



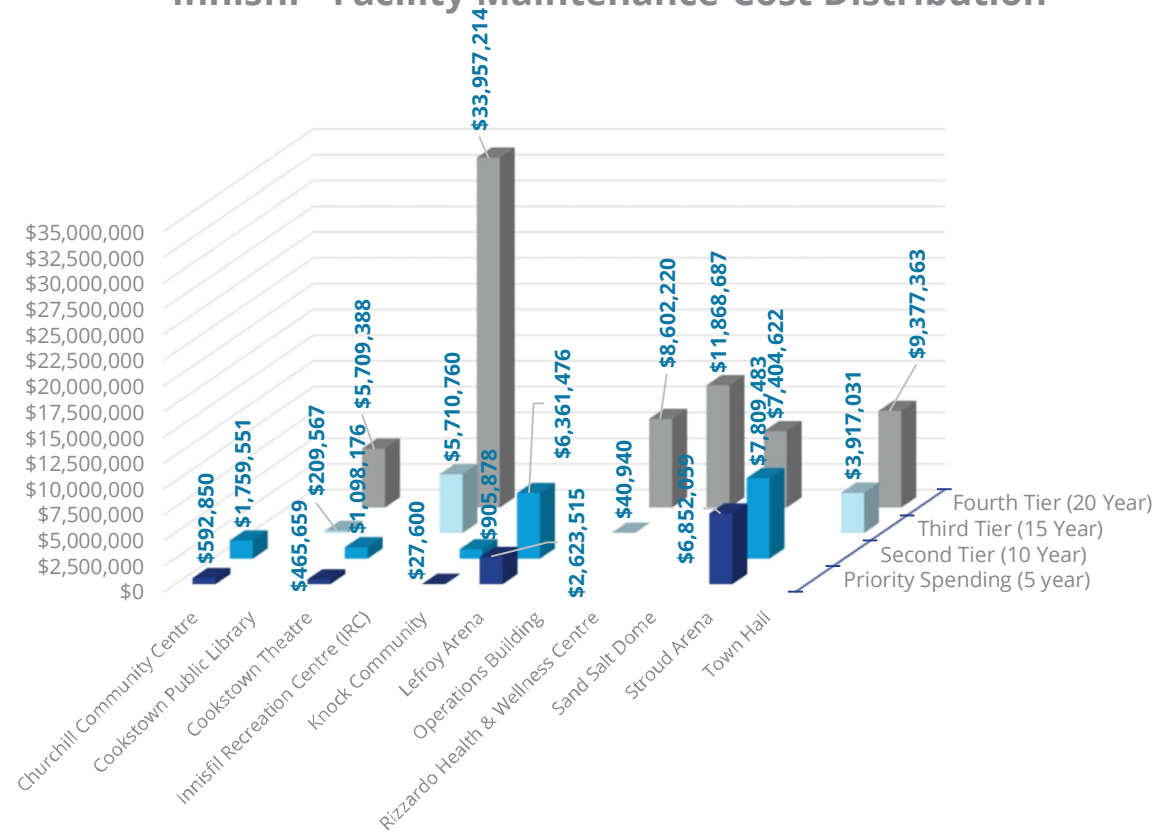
# Proposed Guiding Principles

Ranking	Title	Description
1	Amenities for Future Generations	Making provisions for flexibility and changes to how the demands of the community change over time
2	Sustaining the Services	All facilities need to support the desired community services, now and if/when the demand and requirements change as the community grows
3	Multi-Use / Multi-Functional Facilities	Designing and adapting assets / buildings so they can meet a variety of users, activities and functions
4	Modern Functionality	Being adaptable to accommodate changes in the way people interact in/with facilities
5	Smart Investment	The focused and highest-value allocation and use of funding resources for life-cycle investment planning
6	Preserving Heritage	Preserving the past protects the future; but what needs to be preserved and why

# Next Steps

- Stakeholder engagement
- Analysis of capital and operational data
- Use prioritized principals, data analytics, and stakeholder input to determine facility investment needs

## Innisfil - Facility Maintenance Cost Distribution



# Appendix

# Guiding Principles – Detailed explanation

Ranking	Guiding Principles	Importance & Relevance	Examples
1	Amenities for Future Generations	<p>Demands, needs and requirements at a community level can change rapidly and frequently but facilities / buildings are not easily changed.</p> <p>It is thus important that facilities are designed, or modified through upgrades, to be able to provide a greater degree of flexibility as to future anticipated changes.</p> <p>There is a greater need to understand the linkages between space and community planning and the assets owned and envisaged by the community.</p>	<p>Libraries have changed in requirement over the past 50 years – hard copy to digital. Sport facilities need to be able to adapt to changing patterns (tennis = pickleball). Theatres need to be able to provide alternative entertainment spaces (sound rooms; “green screen” spaces) in addition to the traditional stage.</p>

# Guiding Principles – Detailed explanation

Ranking	Guiding Principles	Importance & Relevance	Examples
2	Sustainable Services	<p>Facilities and buildings support and enhance community services and activities.</p> <p>Services and functions are not fixed; they adjust over time and a sound grasp of future visions and plans is required to better understand how the facilities need to adapt to provide the services.</p> <p>Do our buildings / facilities meet the current &amp; future service needs and demands of the community?</p> <p>Does the facility support or detract from the vision we have as a community leadership in terms of support for community services?</p>	<p>A facility currently operates basketball courts. Is this a service the community wants? If it is not, can it be converted to a more modern sport such as pickleball?</p>

# Guiding Principles – Detailed explanation

Ranking	Guiding Principles	Importance & Relevance	Examples
3	Multi-Use / Multi-Functional Facilities	<p>The present cost of building and maintaining assets does not support single-use functionality, or where the use is for a limited calendar period.</p> <p>Designing and adapting assets / buildings so they can meet a variety of users, activities and functions is important.</p> <p>Each facility should be able to be adapted to allow for differing (alternate) functionality and use, if not for the full facility, then at least for a part thereof.</p> <p>Master planning and future planning will take this into account.</p>	<p>Indoor soccer dome can also accommodate indoor tennis with correct planning.</p> <p>Outdoor basketball (summer) becomes outdoor skating rink (winter).</p> <p>Fire Station that also has a retirement facility located above the Station.</p>

# Guiding Principles – Detailed explanation

Ranking	Guiding Principles	Importance & Relevance	Examples
4	Modern Functionality	<p>Modern space design requirements consider social and environmental challenges (pandemic-induced functional requirements).</p> <p>The move to remote working, and a greater digital business and social environment, has changed both how the space is used, and how much space is required.</p> <p>The interactions within administration, and the interactions between Council/administration and the public have changed.</p> <p>The move to a more digital / social media / remote engagement process alters the requirement and functionality of assets and buildings.</p> <p>It may imply smaller or fewer facilities are required.</p>	<p>Facilities are adaptable to the modern technology solutions &amp; requirements.</p> <p>Examples - remote workshop and meeting facilities offered to the community (libraries; community halls).</p>



# Guiding Principles – Detailed explanation

Ranking	Guiding Principles	Importance & Relevance	Examples
5	Smart Investment	<p>The focused and highest-value allocation and use of scarce funding resources is critical with assets that have a long-term investment cycle. Life-cycle investment planning (construction + maintenance + operations) for buildings and fixed assets is impacted by decisions on use, functionality, and location.</p> <p>Do we invest in maintaining / refurbishing existing, or do we demolish / relocate / rebuild to meet new criteria?</p> <p>Relocation of facility may be required to better serve the community (based on demand and needs).</p> <p>How important is Green Technology and designing / maintaining facilities for long-term sustainability?</p>	A cultural center that houses a library, art gallery, museum, and theatre spaces, replacing 4 separate buildings.

# Guiding Principles – Detailed explanation

Ranking	Guiding Principles	Importance & Relevance	Examples
6	Preserving Heritage	<p>Preserving the past protects the future of the community; it recognizes the investments and sacrifices of those gone before.</p> <p>It requires understanding what is the heritage that is being preserved (the building itself, or what it represents) and why it is important to do so.</p> <p>With the building itself – is it the building, parts of the building, or merely what it represents?</p> <p>Is the “heritage” representative of the broader community vision and ethos, or does it speak to a small minority of stakeholders.</p>	<p>The first (and oldest) building in the community.</p> <p>An ice rink with historical memories.</p> <p>A building with a unique function and history.</p>