
Procedure to Update City Build or Large Infrastructure Projects in Asset Registry

Date Approved: **DRAFT**

Section: Capital Asset Management

Date of Last Update:

Lead: Director, Operations

Keywords: Capital Asset Management, Asset Registry,

Supports: **Policy CAM-001 – City of Selkirk Asset Registry Policy**

OBJECTIVES

SUPPORTING POLICY, PROCEDURES, AND TOOLS

Policy

ADMIN 2013-01 Tendering and Procurement Policy

CAM-001 City of Selkirk Asset Registry Policy

Procedures

Migrate Drawing from CAD to ArcGIS Procedure – to be developed

Tools

CAM-001-000-01 City of Selkirk Capital Asset Registry

CAM-003-001-02 Maintenance and Renewal Lifecycle Events Worksheet

CAM-001-000-02 Asset Registry Change Form

Tactical Planning Worksheet

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1 RECEIVE COMPLETED MAINTENANCE AND RENEWAL LIFECYCLE EVENTS WORKSHEET

Who: GIS/Survey Technician

- 1.1. Manager of Appropriate Department will submit a copy of the completed *Maintenance and Renewal Lifecycle Events Worksheet* identifying infrastructure projects for the up coming construction year to the GIS/Survey Technician.

2 TACTICAL PLANNING WORKSHEET

Who: Appropriate Manager

- 2.1 The Appropriate manager will submit a *Tactical Planning Worksheet* to the Director of Operations.

3 BUSINESS PLANNING PROCESS

Who: Director of Operations

- 3.1 The Director of Operations will follow the regular City of Selkirk Business Planning process once a manager has identified and submitted a tactical planning sheet for a large infrastructure project.

4 ASSIGN WORK

Who: Director of Operations

- 4.1 The Director of Operations shall decide whether City Administration will complete large infrastructure project, or if it shall be tendered out.
- 4.2 If the work is to be tendered out, the Director of Operations shall follow the City's *Tendering and Procurement Policy*.

5 DO THE WORK

Who: Contractor, or Assigned City Staff

- 5.1 Carry out the work required to complete the large infrastructure project.
- 5.2 Ensure the Surveyor/Draftsman is involved when required in order to obtain necessary measurements and elevations.

6 RECEIVE & CODE FINAL INVOICE

Who: Operations Clerk

- 6.1 The final invoice for completed work will be received by the Operations Department.
- 6.2 Final invoice will be stamped and coded by the operations clerk with the appropriate Capital Project number, Tactical Plan Number, and Asset ID.

7 SIGN OFF ON FINAL INVOICE

Who: Appropriate Signing Authority

- 7.1 If the final invoice is < \$10,000, the Director of Operations shall sign off on the original invoice.
- 7.2 If the final invoice is >\$10,000, the Chief Administrative Officer must sign off on the original invoice.
- 7.3 A copy of the final invoice shall be provided to the GIS/Survey Technician.
- 7.4 The original Invoice shall be forwarded to the Finance Department for payment.

8 RELEASE OF HOLDBACK

Who: Operations Clerk

- 8.1 Upon the completion of the Hold Back Period (as determined by the size of the project) the Operations Clerk will contact the Finance Department and request the exact amount of the holdback to be released.
- 8.2 A release of Holdback Certificate of Payment will be prepared by the Operations Clerk.
- 8.3 The Release of Holdback Payment will be stamped and coded by the Operations Clerk with the appropriate Capital Project and Tactical Plan Numbers.
- 8.4 A copy of the Release of Holdback will go to the Surveyor/Draftsman.

9 SIGN RELEASE OF HOLDBACK CERTIFICATE

Who: Appropriate Signing Authority

- 9.1 If the Release of Holdback Certificate is valued <\$10,000; the Director of Operations will sign the certificate.
- 9.2 If the Release of Holdback Certificate is valued at >\$10,000; the Chief Administrative officer will sign the certificate.

10 AS-BUILT DRAWINGS

Who: Surveyor/Draftsman

- 10.1 Once the work is completed, and the Surveyor/Draftsman receives a copy of the Release of Holdback Certificate, the surveyor has 30 days to complete all As-Built drawing that documents for the project.
- 10.2 The Surveyor/Draftsman will save a DWG file, in a version that is 2010 or earlier, for the GIS/Survey Technician.
- 10.3 Surveyor/Draftsman to notify GIS/Survey Technician of complete As-Built Drawings and the location where the DWG file has been saved.

Note: These As-Built shall be stored on the shared N: Drive.

11 UPDATE GIS

Who: GIS/Survey Technician

- 11.1 Follow the *Migrate Drawing from CAD to ArcGIS Procedure*.

12 COMPLETE ASSET REGISTRY CHANGE FORM

Who: GIS/Survey Technician

- 12.1 Once the As Built is complete, the *Asset Registry Change Form* must be completed in its entirety.

Note: One form needs to be completed for each asset that is altered in the process of completing the service request.

- 12.1.1 **Change Form Number** – This number is to be obtained from the GIS/Survey Technician. If this number is missing the process will not go forward.
- 12.1.2 **Prepared By** – The name of the purchaser of the new asset.
- 12.1.3 **Asset Title** – Brief title or description of the new asset [eg. 2012 Ford ½ Ton]
- 12.1.4 **CAMP Registry Change Type (1) New, (2) Change):** – Select one of the check boxes. For the purchase of a new asset, select “New”. If there is work being done to the asset that will extend the life cycle of the asset, select “Change”.
- 12.1.5 **Asset Is (1)Donated (2)In Stock (3) New):** - Select the correct check box. If the new asset is new, attach a copy of the invoice to the CAMP Registry Change Form.

12.1.6 Asset Location – The City of Selkirk street name, city building, or landmark where an asset is located.

12.1.7 As-Built Location – This field is required for assets that are constructed from engineered drawings. If the asset does not have an associated as-built write N/A on this line.

12.1.8 In-Service Date –Record the date that the new asset will be in use by the City of Selkirk.

12.1.9 Warranty Period /Date -If the new asset comes with a warranty, record the length of the warranty as well as the date the warranty will expire.

12.1.10 Purchase Order Number Associated with Asset: Record the purchase number.

13 ORIGINAL CHANGE FORM TO FINANCE

Who: GIS/Survey Technician

13.1 Once the change form is complete, make a copy and forward the original to the Finance Department in order to maintain a current tangible Capital Asset Schedule. Include copies of any applicable invoices.

13.2 A Copy of the Change Form shall be filed with the GIS/Survey Technician, in the Change Form Log.

14 REGISTRY UPDATE

Who: GIS/Survey Technician

14.1 Update the asset in the *City of Selkirk Capital Asset Registry*. Refer to the *City of Selkirk Asset Registry Policy* for instructions on how to complete each column in the Asset Registry when updating an Asset.

15 FILE THE ASSET REGISTRY CHANGE FORM

Who: GIS/Survey Technician

15.1 Once the Asset Registry has been updated, the completed *Asset Registry Change* form can be filed. Include a copy of any applicable invoices.