Asset Management –
Organizational Governance Framework

Version 1.1

Prepared by
The City of Winnipeg
Infrastructure Planning Division

April 2016

Corporate Finance Department
Winnipeg, MB R3B 1B9
### Template Quality Information

(This section is used to track changes to the AMO Governance Framework template design)

<table>
<thead>
<tr>
<th>Document Revision No.</th>
<th>Revision(s)</th>
<th>Date Released</th>
<th>Released By</th>
</tr>
</thead>
<tbody>
<tr>
<td>V1.0</td>
<td>Initial Version Release</td>
<td>March 31, 2016</td>
<td>Ron Amann</td>
</tr>
<tr>
<td>V1.1</td>
<td>Enabled embedded PDFs</td>
<td>April 11, 2016</td>
<td>Krista Molinski</td>
</tr>
</tbody>
</table>
Table of Contents

Introduction .................................................................................................................................................. 4
Business Need ............................................................................................................................................... 5
Organizational Governance Model ............................................................................................................... 6
Organization Structure .................................................................................................................................. 7
AMO Vision and Mission Statement ........................................................................................................... 10
Roles and Job Descriptions ......................................................................................................................... 11
Asset Management/Project Management Knowledge vs. Industry-Specific Discipline Knowledge .......... 14
Position Title Management ......................................................................................................................... 15
Phase 2 – Alignment of Existing Roles ........................................................................................................ 15
Appendix A AM Position Matrix .................................................................................................................. 16
Appendix B Standard Job Description Templates ...................................................................................... 19
Appendix C Application Process ............................................................................................................... 20
Asset Management – Organizational Governance Framework

Introduction

As a key element of F1-011, the Asset Management Policy is alignment of the “people”. To ensure that the People Element is integrated into our Asset Management System, FM004 - the Asset Management Administrative Standard states a number of requirements such as organizational governance, defined roles and responsibilities, training and competency development.

The purpose of this Framework is to provide departments with information that can support their transition to align with FM004.

Transitioning to the Organization Governance outlined in this document will impact each department in varying degrees. The need is for departments to develop a roadmap, complete with a timeline, to transition from their current state to the new structure.
**Business Need**

The Business Needs that support F1-011 and FM004 are:

- To address a number of Audit recommendations related to defined roles and responsibilities, and having an organizational structure that can support the Asset Management System.

- To address the findings of the Investment Planning and Project Management Quality Review which identifies the need to have an entity and individual responsible for looking horizontally across the Department to ensure consistent application of the two processes or, more generally, FM004. See Figure 1.

- To have an organizational structure that will facilitate City staff to succeed and excel in implementing and managing the Asset Management System at all levels in the organization.

- To develop consistent job descriptions across the organization so that the entire organization has the same reference points when defining qualifications and competencies for the specific roles in the Asset Management System.

- To address the AM/PM Network Committee’s request, supported by the Advisory Committee, to develop a career track for City Staff working in the Asset Management space (i.e. Investment Planner and Project Manager).

Figure 1, below, illustrates the concept of having a *horizontal* view across the department for Investment Planning and Project Delivery versus having an independent *vertical* view focused on the business.
Organizational Governance Model

The foundation of the People Element is the design of a governance structure that can support the Asset Management System and can deliver the criteria defined in F1-011 and FM004. FM004 identifies the Governance Model (noted in Figure 2 below). This model defines key responsibilities and accountabilities.

**Corporate Asset Management Office**
- Governance
- Quality Management
- Training
- Strategic direction

**Corporate AMO is responsible for:**
- Developing and managing the governance documentation, processes, procedures, tools and templates.
- Ensuring that the components of the AMMS are followed.
- Quality Management: reviews and continuous improvement.

**Departmental AMO (Asset Management Office)**

**Asset Managers and Investment Planners:**
- Managing the Assets and developing Investment Plans based on the AM Governance Documents
- Performance Reporting

**Project Managers and Contract Administrators:**
- Delivering the Program or Project based on the AM Governance Documents
- Performance Reporting

**Defined Roles**

**Council Approves:**
- Asset Management Policy
- Budgets

**CAO is responsible for:**
- Approving AM Strategy and Administrative Standard
- Ensuring compliance with Administrative Standard

**CFO is responsible for:**
- Ensuring adequate resources are available to deliver the Program
- Delivery of the Asset Management Program

**Figure 2 – Organizational Governance Model**
Organization Structure

An organizational structure is needed to support and align with the responsibilities and accountabilities identified in Figure 2.

This Framework identifies two generic organizational structures that can be used by Departments to align with the Governance Model.

Departments need to work towards designing an organizational structure into their organization that meets the requirements identified in Figure 2, and has captured the high-level responsibilities identified in Figure 3 or Figure 4.

The key difference between the organizational structures in Figure 3 and Figure 4 is the number of Asset Management responsibilities that are transferred to another department via Service Level Agreements.
Figure 3 – Asset Management Office

This structure is more suited to Public Works, Transit, Water & Waste, and Planning Property and Development.

Note:

- AMO focus is strategic and aligning investments in services with work outcome.
- Project Delivery can be aligned under the AMO depending on Departments but the focus needs to be Asset Management. This would be consistent with how Corporate Support Services is aligned.
- Manager of Major Capital is responsible for reviewing major capital projects.
Figure 4 – Asset Management Office

This structure is more suited to Community Services, Winnipeg Police Service, and Fire & Paramedic Service.
AMO Vision and Mission Statement

AMO Vision Statement

The vision for the Corporate and Departmental AMO is to:

- Provide a City-wide standard approach to the Asset Management discipline by promoting and implementing Asset Management best practices.
- Build Asset Management maturity at all levels in the organization.
- Support City staff by providing Asset Management leadership and expertise.
- Create a culture where all asset decisions are investment decisions and that those investments line up with work outcomes and the objectives of the organization.
- Be a communication hub for Asset Management both vertically and horizontally within the organization.

AMO Mission Statement

The mission of the City of Winnipeg’s Asset Management Office or Portfolio Management Offices (AMO) is to provide an enterprise-wide approach to identify, prioritize, and successfully deliver investments that align with the Asset Management Policy Vision.

The AMO’s primary objectives are to:

- Establish and implement Asset Management best practices.
- Create and manage an efficient and effective Asset Management system for the entire organization to align.
- Be responsible for measuring, controlling and improving the Asset Management System by utilizing Quality Management techniques.
- Develop a discipline that recognizes, accommodates and aligns the risk of owning a particular asset with the operational goals (Service targets).
- Encourage collaboration, standardization, and overall improvement of the City’s Asset Management community.
- Be a mentor and support hub – be more than a rule-keeper. Focus on coaching, mentoring and training to achieve the Vision and Mission Objectives.
- Continually track and measure benefit of investments to service level targets.
- Continually track and measure benefits of our investment in assets to achieve the Asset Management Policy vision.
- Provide strategic and investment-specific reporting that meet the needs of Senior Management.
Roles and Job Descriptions

Specific roles are identified within the above organizational structures. The objective is to align defined qualifications and competencies within each role to gain consistency and continuity within the entire Governance Model.

For the City as an organization, it is critical that when we say, for example, “you are a Project Manager”, the entire Public Service understands what competencies and experiences are associated with that role. This needs to be replicated to the other roles within the Asset Management System.

There are specific job descriptions that departments need to incorporate into any new positions, and over time, migrate and align existing positions to meet the duties and qualifications.

Standardized job descriptions have been developed for each of the roles/positions below:

- Manager AMO (Asset Management Office)
- Manager of Major Projects
- Manager of Project Delivery Office
- Program Manager
- Project Manager
- Project Coordinator
- Project Officer
- Asset Strategic Investment Planner
- Portfolio Financial Analyst
- Asset Manager Specialist

Note: Asset Engineer (Future)

Project Management Career track

The line of progression for a Project Manager is illustrated in Figure 5.

Depending on the organizational structures of each area, departments may not have all the identified positions.

Many of the duties and qualifications overlap between the positions as there are foundational duties and qualifications that are required for each role. However, the differences between the roles are determined based on the program or projects that the role is associated. That is, the senior roles manage projects that typically are a larger dollar value, are more complex, and have more risk associated with their management and delivery. Figure 5 illustrates this concept.
Figure 5 – Role Relationship and Line of Progression (possible career track)
Note #1:
Although a project may be a large dollar value, it does not necessarily mean the project fits the significant risk (impact) category such as Water Main Renewal and Programs. Conversely, those projects with a small dollar value could fit the category of significant risk such as Corporate IT projects. Therefore, when defining these roles within the AMO, these two factors need to be reconciled. The Corporate Asset Management Office will provide guidance in classifying those parameters.

The following offers additional guidance in quantifying risk:

- **Significant Risk**
  At this level, individuals are making decisions where there is high likelihood and high consequence that errors will have significant impact in terms of dollars and public visibility.
  An example is the approval of the Departmental Investment Plans or Project Delivery approval for Major Capital Projects that have significant public scrutiny.

- **Critical Risk**
  At this level, individuals are making decisions where there is high likelihood and moderate consequence that errors will have a critical impact in terms of dollars and public visibility.
  An example is the development of Business Cases for creating the Investment Plan or managing specific projects.

- **Marginal Risk**
  At this level, individuals are making decisions where there is moderate likelihood and moderate consequence that errors will have a marginal impact in terms of dollars and public visibility.
  An example is the development of Business Cases for creating the Investment Plan or the decision-making on managing specific projects.

- **Negligible Risk**
  At this level, individuals are making decisions where there is moderate likelihood and minimal consequence that errors will have a negligible impact in terms of dollars and public visibility.
  An example would be the decision-making on specific projects or contracts that are routine in nature versus complex, one-of-a-kind type of projects.

- **Minimal Risk**
  At this level, individuals are making decisions where there is moderate likelihood and minimal consequence that errors will have a minimal impact in terms of dollars and public visibility.
  For example, not only is there decision-making on specific contracts but also that the role is supervised by a senior position.
Asset Management/Project Management Knowledge vs. Industry-Specific Discipline Knowledge

The relative skill and knowledge that a role requires in Asset Management versus an industry-specific discipline (e.g. Civil Engineering/Technologist or Building Architect/Engineer/Technology, etc.) depends on the value of the investment, risk and complexity of the project.

As a guide, typically the more complex and riskier the project the more skills required by the City in Project Management to deliver the investment versus discipline-specific skills that are related to the product. The reasoning is that for these types of investments, a specific role is assigned to the industry/discipline area (product), and the City’s key responsibility is to manage and deliver the investment, which requires the Project Management skill-sets.

General management skills are also necessary as the project increases in value, risk and complexity. These general management skills include knowledge in HR policy, standards, organizational culture, and government standards.

The graph in Figure 6 illustrates this concept.
Position Title Management

The Infrastructure Planning Division together with CSS - Comp & Class are responsible for controlling specific names used in the job title for positions within the Asset Management System.

The title names are:

- Portfolio
- Program
- Project
- Asset

The objective is to create consistent and alignment of title names to avoid confusion, and blending of operational functions with the responsibilities and duties associated with the Asset Management and Project Management disciplines.

Alignment of existing job titles that conflict and how they align will be determined in Phase 2.

Phase 2 – Alignment of Existing Roles

Alignment of Existing Roles

Not all roles in a Department will need to transition to the Organizational Governance Guideline.

For example, business owners such as divisional and branch managers or discipline experts such as Planners, Planning Engineers, Design Engineers, Financial Accountants or IS&T engineers whose primary responsibility is a specific discipline related to the product or business area do not need to transition. However, key elements of the Investment Planning and Project Delivery discipline will need to be adopted.

Once the Managers of the Departmental Asset Management Offices are in place, the Corporate AMO Manager will work with Corporate Support Services – Corporate HR and the Departmental HR Managers to develop a transition plan to align with the objective of the Organizational Governance Guideline. Corporate HR will lead the process of identifying existing positions and determining how to facilitate the transition.

Standardizing Additional Job Descriptions

Once the Managers of the Departmental Asset Management Offices are in place, a project is initiated to determine what other roles (Positions) within the Asset Management System require standard job descriptions.

Job descriptions that have been identified to-date:

- Asset Management Engineer
## AM Position Matrix

<table>
<thead>
<tr>
<th>Position</th>
<th>Rated Level</th>
<th>Position Description</th>
<th>Types of Investments/Projects</th>
<th>Risk Description</th>
<th>Risk &amp; Complexity Criteria</th>
</tr>
</thead>
</table>
| Manager AMO | 7 | Responsible for:  
• managing the department’s alignment to the Corporate Asset Management system.  
• ensuring investments align to defined service target and that investment benefits are tracked and realized through project delivery and into operations.  
• ensuring direct link (line of sight) between service goals and objective with work outcomes (investments).  
• ensuring investments are made based on consistent delivery of established customer service levels at an acceptable level of risk while minimizing an asset’s lifecycle costs.  
• managing the performance of the Project Management system. For example, how many Change Orders, how risk and contingencies are managed, missed milestones and budget cost variances. | The department’s entire portfolio of investments.  
Investment types based on type(s) of Services and assets that the department is mandated to provide. | Investment decisions commit the City’s finances to significant short- and long-term risk in terms of our financial ability to pay and borrow money, and meet customer service targets.  
These investment decisions involve aligning complex multi-stakeholder groups with non-routine/complex investments that affect the entire department’s Capital and Operating Budget.  
Decisions have a high likelihood and consequence that errors will significantly affect how Services are managed and delivered within the department. | • Decisions impact the entire Capital Budget based on financial limitations.  
• Services are delivered and managed within financial constraints.  
• Type & Number of Stakeholders = Entire Service Customer group.  
• Political awareness = Federal/Province/Municipal (i.e. Tri-Funding Agreements).  
• Impact of Decisions = Results in how services are delivered and managed (financial risk).  
• Significant Public/media attention/high visibility.  
• Critical exposure of confidential information. |
| Manager of Major Capital Projects | 7 | Management of a specific high risk and complex program or project that requires a full-time Project Manager.  
• PeopleSoft Enterprise implementation.  
• TransitWay.  
• W&W Sewer Upgrades. | Management of multi-stakeholder, non-routine/complex projects typically valued at greater than $20 million and range up to $100+ million dollars – there may be projects with a lower dollar value but the risk and complexity associated with the project would remain significant.  
Making decisions where there is a high likelihood and consequence that errors will have a significant impact in terms of dollars and public visibility. | | |

---

**Note:**

- **Manager AMO**
  - Responsible for managing the department's alignment to the Corporate Asset Management system.
  - Ensuring investments align to defined service targets.
  - Ensuring the direct link between service goals and outcomes.
  - Ensuring consistent delivery of established customer service levels.
  - Managing the performance of the Project Management system.

- **Manager of Major Capital Projects**
  - Management of specific high risk and complex projects.
  - Projects typically valued at greater than $20 million with potential up to $100+ million dollars.
  - Making decisions with high likelihood and consequence.

---

**Risk Description**

- Investment decisions commit significant short- and long-term risk in terms of financial ability to pay and borrow money, and meet customer service targets.
- These decisions involve aligning complex multi-stakeholder groups with non-routine/complex investments.
- Decisions have a high likelihood and consequence that errors will significantly affect how services are managed and delivered within the department.

**Risk & Complexity Criteria**

- Decisions impact the entire Capital Budget based on financial limitations.
- Services are delivered and managed within financial constraints.
- Type & Number of Stakeholders: Entire Service Customer group.
- Political awareness: Federal/Province/Municipal (Tri-Funding Agreements).
- Impact of Decisions: Results in how services are delivered and managed (financial risk).
- Significant Public/media attention/high visibility.
- Critical exposure of confidential information.
<table>
<thead>
<tr>
<th>Position</th>
<th>Rated Level</th>
<th>Position Description</th>
<th>Types of Investments/Projects</th>
<th>Risk Description</th>
<th>Risk &amp; Complexity Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager Project Delivery Office</td>
<td>6</td>
<td>Responsible for:</td>
<td>Projects related to different service areas and of various dollar amounts and risk. (i.e. A division’s entire portfolio of projects).</td>
<td>Position has a significant visibility with stakeholders in how projects are performing and variance is managed.</td>
<td>• Manage the delivery of multiple projects across different service areas.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• leading and supporting the delivery of multiple programs or projects.</td>
<td></td>
<td>Decisions relate to how risk is managed on a project and have a significant consequence of error if those risks (contingencies) are managed.</td>
<td>• Type &amp; Number of Stakeholders = Manages the PM who manages the stakeholders which could be City-wide or multiple quadrants.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• monitoring Project Delivery methodology to ensure Project Managers adhere to PMM standards.</td>
<td></td>
<td></td>
<td>• Political awareness = Federal/Province/Municipal (i.e. Tri-Funding Agreements).</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• monitoring project’s performance metrics and takes action to address negative variances in how a project is performing. (i.e. over budget).</td>
<td></td>
<td></td>
<td>• Impact of decisions = Could result in financial losses of &gt; $5 millions of dollars (financial risk)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• quality of program and Project Delivery performance; scope, schedule, cost and risk management.</td>
<td></td>
<td></td>
<td>• Significant Public/media attention/high visibility</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• assigning resources to projects, support, develop and QA/QA of PDP artifacts such as BOE, Stakeholder Assessment, and Risk Register.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Participating/ed on various Advisory Committees, selection committees.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Program Manager</td>
<td>6</td>
<td>Manage multiple projects to achieve benefits and control that cannot be achieved by managing the projects independently.</td>
<td>Develops Investment Plan and manages resources which deliver multiple projects that are aligned to achieve consistent benefits: • Water Services. • Regional streets program • Refuse • Recreational services.</td>
<td>Investment decisions that determine how a specific service or asset class will perform for the customers.</td>
<td>• Decisions impact the Capital and Operating Budgets of a specific Service based on financial limitations.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Develop Investment Plans for identified needs, manage delivery of multiple projects and tracks realized benefits of investments within a division or service area.</td>
<td></td>
<td>Significant short- and long-term risk where financial and others resources are expended to meet customer service targets. These investment decisions involve aligning complex multi-stakeholder groups with non-routine/complex investment that impact an entire Service Capital and Operating Budget.</td>
<td>• Services are delivered and managed within financial constraints.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Consistent with responsibilities of the Manager of the AMO but for a smaller portfolio of Investments.</td>
<td></td>
<td>Decisions have a high likelihood and consequence that errors will significantly impact how a Service are managed and delivered within the Department.</td>
<td>• Type &amp; Number of Stakeholders = Specific Service Customer group.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• Political awareness = Federal/Province/Municipal (i.e. Tri-Funding Agreements).</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• Impact of decisions = Results in how services are delivered and managed (financial risk).</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• Significant Public/media attention/high visibility.</td>
</tr>
</tbody>
</table>
## AM POSITION MATRIX

<table>
<thead>
<tr>
<th>Position</th>
<th>Rated Level</th>
<th>Position Description</th>
<th>Types of Investments/Projects</th>
<th>Risk Description</th>
<th>Risk &amp; Complexity Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Manager</td>
<td>5</td>
<td>Experienced Manager of multiple projects with a full range of education and applied experience. Ability to manage high-risk and complex projects with minimal supervision.</td>
<td>Ability to manage a diverse set of projects.</td>
<td>Manages multi-stakeholder, non-routine projects typically valued at approximately $10-15 million dollars – there may be projects with a lower dollar value but the risk and complexity associated with the project would remain significant; Making decisions where there is a high likelihood and moderate consequence that errors will have a critical impact in terms of dollars and public visibility.</td>
<td>• Manages multiple projects of small to medium size. • Type &amp; Number of Stakeholders = Inter-departmental and external stakeholders. • Political awareness = Typically limited to City-elected officials; could impact Federal &amp; Province. • Impact of decisions = Could result in financial losses of &gt; $5 millions (financial risk) • Occasional Public/media attention/medium visibility. • May involve working with confidential information.</td>
</tr>
<tr>
<td>Project Coordinator</td>
<td>4</td>
<td>• Intermediate level of Project Management. • Ability to work independently on projects with defined milestone approval. • Authorized to sign-off on project deliverables.</td>
<td>Ability to manage a diverse set of projects.</td>
<td>Manages multi-stakeholder, routine projects typically valued at approximately $5 million dollars (There may be projects with a lower dollar value but the risk and complexity associated with the project would remain moderate) Making decisions where there is a moderate likelihood and minimal consequence that errors will have negligible impact in terms of dollars and public visibility.</td>
<td>• Type &amp; Number of Stakeholders = Inter-departmental and external stakeholders. • Political awareness = Typically limited to minor interaction with City-elected officials • Impact of decisions = Could result in financial losses of Millions of dollars (financial risk)</td>
</tr>
<tr>
<td>Project Officer</td>
<td>3</td>
<td>Ground level for the Project Management career path. Typically focused on Contract Administration tasks while gaining experience in Project Management.</td>
<td>Supports the delivery of the projects identified by the Project Manager and Project Coordinator.</td>
<td>Manages routine (non-complex) projects typically valued at less than $5 million dollars. Making decisions where there is a moderate likelihood and minimal consequence that errors will have minimal impact in terms of dollars and public visibility. This position makes decisions on specific contracts while being supervised by a senior position.</td>
<td>• Type &amp; Number of Stakeholders = Inter-departmental. • Political awareness = very little to no interaction with City-elected officials. • Impact of decisions = Decisions are referred to a Supervisor.</td>
</tr>
<tr>
<td>Asset Strategic Investment Planner</td>
<td>5</td>
<td>Responsible for developing robust, transparent defendable investments plans. Leads departments in developing LOS Models, Service Strategic Management Plan, Risk Assessments, and managing the Quality Management Plan.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asset Management Specialist/ Coordinator</td>
<td>5</td>
<td>Asset Register Management, Asset risk and criticality assessments.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Capital Portfolio Financial Accountant</td>
<td>5</td>
<td>Detailed financial analyst of the portfolio, balancing cash flow expenditures with funding options.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Appendix B  Standard Job Description Templates

The following is a list of Job Description Templates.
Double-click the PDF to open the applicable template.

<table>
<thead>
<tr>
<th>Job Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager, Asset Management Office</td>
</tr>
<tr>
<td>Manager Major Capital Project</td>
</tr>
<tr>
<td>Manager, Project Delivery Office</td>
</tr>
<tr>
<td>Program Manager</td>
</tr>
<tr>
<td>Project Manager</td>
</tr>
<tr>
<td>Project Coordinator</td>
</tr>
<tr>
<td>Project Officer</td>
</tr>
<tr>
<td>Departmental Asset Management Specialist</td>
</tr>
<tr>
<td>Asset Strategic Investment Planner</td>
</tr>
<tr>
<td>Capital Portfolio Financial Accountant</td>
</tr>
</tbody>
</table>
Appendix C  Application Process

The process to have positions related to the Asset Management System rated/re-rated is identified below. Corporate Support Services - Labour Relations & Total Compensation Branch is the process owner and responsible for managing the process and adjusting as improvements are identified.

Appendix A – AM Position Matrix

<table>
<thead>
<tr>
<th>Position</th>
<th>Role Relationship</th>
<th>Risk Description Detail</th>
<th>Risk Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager</td>
<td>AMO</td>
<td></td>
<td>5</td>
</tr>
<tr>
<td>Project</td>
<td>Officer</td>
<td></td>
<td>6</td>
</tr>
<tr>
<td>Investment Planner</td>
<td>Program Manager</td>
<td></td>
<td>7</td>
</tr>
<tr>
<td>Capital</td>
<td>Portfolio Accountant</td>
<td>Asset Management</td>
<td>3</td>
</tr>
<tr>
<td>Financial</td>
<td>Manager, Project Delivery Office</td>
<td>Asset Strategic Investment Planner</td>
<td>4</td>
</tr>
</tbody>
</table>

STEP 1: Use the Role Relationship to identify the type of position needed.

STEP 2: Determine the Position Level that is applicable to the Business Need based on type of work, risk and complexity of work and decisions made.

STEP 3: Use the Risk Description Detail List to assist in defining the risk level.

STEP 4: Once the position and standard JD are determined, complete the “Request for Review” Application.

STEP 5: continued on next page.

Appendix C – AM Position Matrix

<table>
<thead>
<tr>
<th>Position</th>
<th>Role Relationship</th>
<th>Risk Description Detail</th>
<th>Risk Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager</td>
<td>AMO</td>
<td></td>
<td>5</td>
</tr>
<tr>
<td>Project</td>
<td>Officer</td>
<td></td>
<td>6</td>
</tr>
<tr>
<td>Investment Planner</td>
<td>Program Manager</td>
<td></td>
<td>7</td>
</tr>
<tr>
<td>Capital</td>
<td>Portfolio Accountant</td>
<td>Asset Management</td>
<td>3</td>
</tr>
<tr>
<td>Financial</td>
<td>Manager, Project Delivery Office</td>
<td>Asset Strategic Investment Planner</td>
<td>4</td>
</tr>
</tbody>
</table>

STEP 1: Use the Role Relationship to identify the type of position needed.

STEP 2: Determine the Position Level that is applicable to the Business Need based on type of work, risk and complexity of work and decisions made.

STEP 3: Use the Risk Description Detail List to assist in defining the risk level.

STEP 4: Once the position and standard JD are determined, complete the “Request for Review” Application.

STEP 5: continued on next page.
STEP 5: Explain and Detail the supporting rationale for the position selected. Use the descriptors that are identified in the AM Position Matrix and Risk Description Detail list.

Rationale for the Position Selected:
- General Info such as Industry-Specific Knowledge
- The types of projects
- The size of projects ($)
- Complexity Scope
- Impact of decisions
- Organizational Structure
- Risk, etc.

STEP 6 (Optional): In a copy of the Standard JD, identify the specific attributes (highlighted in Red) as relevant to the position within your department.