

PART 2 – WEAVING THE PIECES



Levels of Service Template Walkthrough

1. Go to the following website <https://assetmanagement.toolkitnwtac.com/>
2. Scroll down to Levels of Service and download the documents called “Levels of Service Template” and “Levels of Service Supporting Guide”.
3. Read through the “Levels of Service Supporting Guide” prior to filling in the “Levels of Service Template”. The “Levels of Service Template” goes through each step with guided instructions and prompts.
4. In the document named “Levels of Service Template”, open the first tab named “1) Introduction” and fill in your community information in the dark blue and teal box at the top, shown in the image below. These steps are listed in the guide at the top of page 5.

Levels of Service Template Last Updated: [Date]

[Your Community Name]

Community Infrastructure Service Delivery Goals:
[Describe corporate infrastructure service goals or commitments here. List the source documents for future reference.]

- e.g. Comply with all legislative requirements.
- Achieve condition and performance targets in order to provide capacity, quality, and reliable services.
- Ensure the safety of services and infrastructure.
- Consider sustainability and long-term benefits to future generations.

1) Introduction

5. Read through the introduction on this tab. This tab will introduces the purpose of the template, what the process involves, what levels of service are, the process for documenting and evaluating levels of service, definitions, references, and acknowledgements.
6. Open the tab named “2) Services and Assets”. The steps for “1. Identify Your Services” are located on page 5.

1

Identify your Services

The purpose of this worksheet is to document what services the municipality provides, THEN to identify the assets involved in delivering each service. This ensures that you are organizing your assets based on their function in serving the community, rather than trying to define services based on the assets you have.

1. List your service areas:

- ▶ Modify the defaults as needed
- ▶ Describe services under each category
- ▶ Use bylaws, budgets and service plans as your references
- ▶ *Don't start with the assets!*

7. In the column named "Service Area", scroll down and see if the template has captured all the service areas in your community. It includes drinking water, sewer, drainage (stormwater), solid waste, general transportation, public transportation, recreation and cultural services, protective services, general government services, and energy services. Feel free to add or remove any service areas that are required or do not exist in your community.
8. Next, move to the column named "Services Provided". The blue items in the column are listed as examples. Feel free to add or remove them as they are relevant to your community. Drinking water will be used as an example throughout this document. Think about all related services provided to your community members in regard to drinking water. This example has listed supply, treatment, piped distribution and trucked distribution. To brainstorm, think about the following questions:
 - "How do our community members receive drinking water?"
 - "Where does our drinking water come from?"
 - "Is the water treated?"
 - "Do we have a combination of services provided?"
9. On page 5 of the guide, read the section named "Identify your Assts".

2

Identify your Assets

1. List the assets for each service:

- ▶ Modify the defaults as needed
- ▶ Use capital plans and asset registers as your references
- ▶ *This is not a complete inventory; the purpose is to link asset groups to services.*
- ▶ Adjust the table to describe the services you provide (delete rows that aren't needed, and add sections if needed for service areas not included in the template)

NOTE: Changing content in this tab has no influence on the rest of the template.

10. Next, move to the column named “Identify your Assets”. The blue items in the column are listed as examples. Feel free to add or remove them as they are relevant to your community. List off all the assets or infrastructure that are used in the process of providing the services shown in the column named “Services Provided.” For example, water delivery trucks and truck filling facilities are required for trucked distribution. Sampling stations, water meters and chambers, valves, fire hydrants, pump stations, service connections, portable water pipes, and water mains are all assets used for piped distribution. Storage facilities and wells are used for supply. The water treatment plant is the required infrastructure for treatment. Talk to your asset management advisory committee for help brainstorming assets.

Service Area	Services Provided	Asset Types
Drinking Water	Supply	Water Mains
	Treatment	Portable Water Pipes
	Piped Distribution	Service Connections
	Trucked Distribution	Treatment Plant
		Wells
		Storage Facilities
		Pump Stations
		Fire Hydrants
		Valves and Chambers
		Water Meters and Chambers
		Sampling Stations
		Truck Filling Facilities
	Water Delivery Trucks	

11. Repeat this process for all service areas in your community. Review them with your asset management advisory committee or team to assure your template is accurate and up to date.

12. When finished, move on to the tab labelled “3) Describing Levels of Service”. This section can be found on page 6 of the guide.

Describing Levels of Service

Not every service needs a service level associated with each characteristic of service. **These characteristics often overlap, and some service levels may reflect more than one of them.**

Thinking about services using these characteristics can help to consider what levels of service need to be documented. Use the provided examples as a basis to develop your own. Adjust wording to suit your own community. Add or delete indicators as needed.

The indicators must be measurable, but not necessarily quantitatively. Community levels of service are usually subjective, since they are intended to reflect how users perceive the service.

3 Describe Current Levels of Service

General properties that may be used to describe a service:

- ▶ **Regulatory:** What is the legal minimum?
- ▶ **Capacity/Availability:** How much, where, when and for whom?
- ▶ **Safety:** Protecting people and property
- ▶ **Quality:** How good is it (and in what respect)?
- ▶ **Reliability:** How often is service interrupted?
- ▶ **Sustainability:** How well is the environment protected?
- ▶ **What are the Municipality's commitments to the public?**

13. In the column named "Indicator", edit or change the indicator to the relevant general property. Do this for each general property/service characteristic (regulatory, capacity/availability, safety, quality, reliability, and sustainability). As shown in the template, this was completed for drinking water. The indicator for regulatory reads "drinking water quality complies with statutory requirements", meaning the water would comply with the Canadian water drinking guidelines. The indicator for capacity reads "available water supply is sufficient for customer's needs." The indicator for availability reads "water distribution infrastructure is accessible for servicing lots throughout the service area".
14. Once the indicators are completed for each general property/service characteristic, evaluate your current levels of service. The column named "Example Levels of Service" shows ratings from 1 through 4. 1 being low and 4 being high. For regulatory, the Canadian drinking water guidelines is the minimum service level, so this must be achieved, so there are no evaluations for this category. For Capacity, a 1 or low is considered "capacity is available for basic household needs only, no garden irrigation." A 4 or high is considered "capacity is available for all indoor and garden uses, with outdoor restrictions less than once every ten years". In the column with a # as the title, fill in where your community currently falls on the evaluation scale. Do this for each general property. The evaluation descriptors 1-4 can be changed based off your communities needs. Take time to determine these descriptions with your asset management advisory committee.
15. In the column "Level of service commitment", it will autogenerate the description with the associated number in the # column. For example, if 1 is placed for capacity, the level of service commitment will read "capacity is available for basic household needs only; no irrigation" or whatever evaluation descriptor has been placed under the column 1.

16. Continue this process for every general property/service characteristic.

17. Repeat steps 13-16 for each service area. Review the completed steps with your asset management advisory committee.

3) Describing Levels of Service									
What is the current level of service and how much does it cost to provide this service?									
This worksheet documents the current level at which each service is being provided, from a community perspective, and an estimated cost of providing this service. The Drinking Water Service Category has been completed as an example (in blue text). For each major service category, enter the total estimated cost of providing the service (e.g. from budget or financial statements).						3 Describe Current Levels of Service		4 Identify Performance Measures	
Service Characteristic	Indicator	Example Levels of Service				Level of Service Commitment	Performance Measures	Source Document	
		Low 1	2	3	High 4				
Drinking Water						Estimated Total Cost	\$800,000		
Regulatory	Drinking water quality complies with statutory requirements	Minimum service level				Drinking water quality complies with statutory	O&M data, expert assessment		
Capacity / Availability	Available water supply is sufficient for customers' needs	Capacity is available for basic household needs only; no garden irrigation	Capacity is available for all household needs; no garden irrigation	Capacity is available for all household needs and restricted garden irrigation.	Capacity is available for all indoor and garden uses, with outdoor restrictions less than once every	1 Capacity is available for basic household needs only; no garden irrigation	expert assessment		
	Water distribution infrastructure is accessible for servicing lots throughout the service area	No water distribution service is provided; users are responsible for hauling their own water	Trucked water delivery is available to all users at least weekly.	Trucked water delivery is available to all users at least twice per week. Piped water distribution is	Piped water distribution is available to all users in the community.	4 Piped water distribution is available to all users in the community.	expert assessment		
Safety	Water supply is sufficient for firefighting purposes	The community does not supply water for firefighting purposes.	None of the community is considered to be hydrant protected for insurance grading purposes. Bulk water is supplied in sufficient quantity for filling pumper trucks.	A portion of the community is considered to be hydrant protected for insurance grading purposes.	All of the community is considered to be hydrant protected for insurance grading purposes and hydrant flow testing and maintenance are fully up to date.	1 The community does not supply water for firefighting purposes.	expert assessment		
Quality	Water service pressure is adequate at customer connections	Frequent customer complaints about water pressure.	Frequent customer complaints about water pressure.	Few customer complaints about water pressure in isolated areas.	Almost no customer complaints about water pressure.	3 Few customer complaints about water pressure in isolated areas.	complaints		
	Water quality is aesthetically pleasing	Fails to meet customer expectations year round on more than two of: taste, colour, odour.	Fails to meet customer expectations year round on one of: taste, colour, odour.	Fails to meet customer expectations seasonally on one: taste, colour, odour.	Meets customer expectations year round on all of: taste, colour, odour, staining.	4 Meets customer expectations year round on all of: taste, colour, odour, staining.	complaints		
Reliability	Water quality notices are infrequent and short in duration	Boil water notices are in effect in most years, or treated water consistently fails to meet a chemical or radiological guideline	Boil water notices occur no more often than every 5 years, or treated water fails to meet a chemical or radiological guideline from time to time	Water quality consistently meets all regulatory requirements.	Water quality consistently meets all regulatory requirements, and testing is done for additional identified risk parameters.	2 Boil water notices occur no more often than every 5 years, or treated water fails to meet a chemical or radiological guideline from time to time	O&M data		
	Service outages are infrequent and short in duration	Frequent major disruptions (>24hrs) to service provision to a large number of customers (>10% of connected users)	Frequent minor disruptions (<4hrs) to service provision, but few major disruptions.	Some minor disruptions to service provision, but frequent major disruptions.	Few minor disruptions to service provision and no major disruptions.	3 Some minor disruptions to service provision, but few major disruptions.	O&M data		