

IAM USA Case Study: Balancing resources with a diverse asset portfolio

Organization Name	Charlotte County, Florida		
Location	Port Charlotte, FL	Organization Type	County Government
Organization Overview	Keywords: Balancing, diverse, portfolio, SAMP, change management		
Charlotte County is a U.S. county located in southwestern Florida. Beautiful beaches, great neighborhoods, and community-based activities make Charlotte County an amazing place to live. The county has a population of around 187,000 people and a total area of 858 square miles, of which 680 square miles is land and 178 square miles (20.7%) is water.			

Problem Statement

Charlotte County faced a daunting challenge: managing and modernizing over 70 years' worth of diverse and aging public infrastructure assets. Challenges included managing significant growth expectations while maintaining aging assets that are over 100 years old. The vast portfolio includes everything from mosquito protection systems to large utilities, bridges, and municipal buildings. The workforce challenges of an aging workforce nearing retirement threatened knowledge continuity, while staff retention is challenged by the competition from the private sector. The existing organizational alignment did not support consistent asset management practices, a general lack of high-quality data on assets across departments made it difficult to make informed investment decisions or implement a standardized asset management process. Most departments, by necessity, maintain a prevailing 'fix it when it breaks' mentality leading to expensive reactive maintenance programs. Stringent legislation and rules limited flexibility in optimizing asset value throughout their lifecycle. The current levels of maturity were not great but somewhat consistent. A lot to reconcile.

These combined challenges resulted in fragmented decision-making, escalating maintenance costs, and declining asset performance. Without a unified approach, departments struggled to prioritize investments, coordinate efforts, or proactively manage infrastructure. The situation underscored a pressing need for a comprehensive, forward-looking asset management strategy—one capable of breaking down silos, improving data quality, and aligning organizational practices to extend asset life, reduce costs, and better serve the growing needs of the community.

Approach

Charlotte County, facing a diverse and aging asset base, recognized the need for a structured, enterprise asset management approach aligned with county objectives. Key challenges included balancing growth with maintenance of century-old assets, managing a wide range of asset types, impending workforce retirements, staff retention issues, outdated organizational structure, poor asset data quality, reactive maintenance culture, strict legislation, and inconsistent investment decisions.

To address these, the organization appointed a Strategic County Asset Manager and committed to the ISO 55001 standard. Major efforts focused on establishing an enterprise asset management program, including breaking down departmental silos, improving data availability, and developing a flexible, unified asset management strategy, despite hurdles like funding limitations, lack of centralized data, and internal resistance.

Key steps to this approach included:

- Creating an Asset Management Governance detailing the commitment from administration and what is expected from each department.
- Creating an Asset Management Policy to show guiding principles.
- Creating a Strategic Asset Management Plan which was crafted as a flexible, department-inclusive plan to guide asset management practices, break down silos, and elevate service delivery.
- Treating all the assets as a portfolio (coordination)
- Aligning a common approach with the county's objectives (line-of-sight)
- Creating and building expertise for each asset class (excellence)
- Conducted comprehensive reviews to identify inefficiencies and gaps in existing asset management practices.
- Engaged stakeholders from all levels early in the process to gather input and foster buy-in.
- Implemented an enterprise CMMS providing real-time asset visibility, enabled automated scheduling, and improved regulatory reporting
- Implemented an Asset Management Certification training program to ensure staff understands the why of what we are doing.
- Implemented extensive training programs to ensure all users are proficient with the new CMMS and understand the revised management practices.
- Gradually introduced changes with pilot programs in critical departments to manage transition risks and gather feedback.
- Managing significant growth expectations while maintaining aging assets
- Capturing knowledge as seasoned employees retire
- Improving the quality of asset data across departments.
- Creating a proactive culture
- Improving consistency of investment decisions through use of a decision-making framework

This Strategic Asset Management Plan (SAMP) arrives at a critical moment, as the county faces tight budget constraints alongside growing expectations with regards to quality and the delivery of exceptional services across the organization. The strategy provides a unified framework to address these challenges, helping to prioritize essential work and ensure that assets are developed and maintained to be reliable, efficient, durable, and fully compliant with applicable laws and regulations. In doing so, it supports the county's long-term resilience, sustainability, and public trust.

The new system has significantly transformed Charlotte County's operations by enabling real-time access to asset data, automating maintenance scheduling, reducing downtime, cutting maintenance costs, improved cost reconciliation and billing, and improving compliance through automated reporting.

Looking ahead, the county plans to:

- Expand ISO 55001 implementation across all departments for a unified asset management approach
- Evolve from basic compliance to advanced practices, reflected in better audit scores and fewer asset failures
- Add additional departments to the Computerized Maintenance Management System (CMMS) to align with strategic goals.
- Establish Charlotte County as a 'Center of Excellence' in asset management within the next decade
- Build on access to real-time access for asset information, improving decision-making and response times
- Automate maintenance scheduling, reducing downtime and extending asset life
- Streamline operations leading to significant cost reductions in maintenance and repair operations
- Achieve a 30% reduction in reactive maintenance costs
- Enhance compliance tracking and automated reporting capabilities, ensuring adherence to regulatory standards.

Success Factors/Lessons Learned/Messages/Key Takeaways

The change process highlighted several important lessons. Strategic oversight and direction from the Strategic Asset Manager demonstrated leadership's commitment to this project and ensured an enterprise approach. Continuous and clear communication played a vital role in overcoming resistance and building awareness of the benefits. Flexibility in strategy was essential to navigate unexpected challenges during implementation. User feedback proved valuable in refining the CMMS, improving both functionality and satisfaction, and ultimately, the organization recognized that change management is an ongoing effort, requiring ongoing training, support, and continuous improvement.

Creating effective asset management practices required breaking down departmental silos through regular cross-departmental collaboration and integrated data systems to ensure alignment and information sharing. The SAMP provided a shared roadmap, aligning all departments with common goals. High-quality asset data is critical for informed decision-making, and while integrating data across sources is still ongoing, it was (and is) essential to ensure data usefulness aligns with both asset management and organizational goals. Cultural resistance still remains a challenge, making comprehensive training and clear communication key to gaining stakeholder buy-in. Additionally, engaging stakeholders through regular updates and feedback has helped to align expectations, prioritize initiatives, and promote shared ownership of the asset management process.

The key lessons learned included:

- Integrating different departments under a unified strategy
- Breaking down silos and aligning departments under a shared strategy is vital for sustained success
- Addressing the absence (and inaccuracy) of asset data
- Adopting continuous and clear communication to addressing resistance and foster an understanding of the benefits
- The ability to adapt strategies in response to feedback and unforeseen challenges helped maintain momentum
- Get regular feedback from users
- Recognize that change management is an ongoing process that requires sustained commitment to training, support, and iterative improvements
- Establish regular cross-departmental meetings to break down departmental silos
- Integrate data systems to ensure all departments align on asset management goals and share critical information and ensure accuracy and availability of data for making decisions
- Comprehensive education programs reduced resistance and built internal capability
- Involving staff at all levels promoted buy-in and smoother adoption of changes
- Investment in people — through training, leadership, and communication — is just as important as investment in technology

References / Further Information

Presented at IAM NA 2024 in Denver

- [taking-control-of-70-years-worth-of-assets-tara-brady-susan-steyn.pdf](#)