

Kickoff Meeting

Kickoff Meeting Invitation Email Template

From: <Assessment Facilitator>

Date: <Date>

Subject: TAM Assessment Process Kickoff Meeting; <Process Focus>

To: <Members of Assessment Team>

Cc: <Project Sponsor>

Thank you for being a part of the <Process Focus> Assessment Team. This important effort will help our organization improve how data is defined, collected, accessed, analyzed, and used in the decision-making process for this asset.

You are invited to attend the kickoff meeting for <Process Focus>.

This meeting will give you a high-level overview of the process. It will introduce the guidebook framework, the element-level response template, and the digital tool. This meeting will also establish future meeting schedules and prepare you for the upcoming self-assessment activities.

The 90 minute meeting is scheduled for <Meeting Date and Time> at <Meeting Location>. Please reach out if you will not be able to attend or if you have any questions.

Thank you,

<Assessment Facilitator>

Kickoff Meeting

Sample Kickoff Meeting Agenda

<Meeting Date>

<Meeting Location>

Objectives: Establish self-assessment meeting schedule and prepare participants for upcoming self-assessment activities

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|-------------------|---|
| 10 Minutes | Process Status Review and Meeting Objectives <ul style="list-style-type: none">• Previous meeting review & current meeting objectives |
| 20 Minutes | Assessment Process Overview <ul style="list-style-type: none">• High-level overview of process• Upcoming activities of the group |
| 20 Minutes | Roles of Team Members <ul style="list-style-type: none">• Explanation of expectations and desired perspectives from individual participants |
| 20 Minutes | Introduction to Guidebook Content and Digital Tool <ul style="list-style-type: none">• Framework and element-level response template walkthrough• Introduction to digital tool, highlight of key contents and use |
| 10 Minutes | Meeting Schedule and Preparations <ul style="list-style-type: none">• Meeting duration and frequency• Preparations for self-assessment activities |
| 10 Minutes | Questions and Feedback |

Kickoff Meeting: Overview and Roles

Overview

Assess the Current and Desired State

Understand available data and information systems, tools, technologies, and practices for a specific asset or element within the data-life cycle. Identify associated data and information system improvements.

Prioritize Improvements

Evaluate identified improvements. Establish priority, relative impact, effort, and organizational challenges associated with potential improvement.

Communicate Improvements and Support Implementation

Create effective communication of the current and desired state, performance gaps, and priority improvements. Support implementation to realize successful, long-term improvements.

Key Roles

Asset Program Lead

Participant will be a program lead from within the selected TAM focus area. Typically, participants will be central office program management, project managers, analysts, or engineers who understand asset management decision-making needs from a policy perspective. Several such individuals should be included

Field Asset Management Leads

Typically, participants will be District asset managers, engineers, or maintenance supervisors who are involved in day-to-day decision making and execution. Must be able to share the practical realities, challenges, priorities, and constraints of field asset management staff. Several such individuals should be included

Information Technology and Staff

Key IT staff who have an understanding of existing technologies, applications, and priorities within the targeted area. Typically, participants will be IT relationship managers, system administrators, project managers, or business and technical analysts. Should be able to share data, technology, or application related context as business needs are discussed. Should be able to raise awareness of solutions leveraged in other business functions. Expected to share technical process, challenges, and constraints that would be anticipated when delivering IT solutions.

Data Life-Cycle Area Subject Matter Experts

Subject matter experts as appropriate to the asset program or specific data life-cycle areas, other key perspectives should be represented.

Data Life-Cycle Framework

A. Specify and Standardize		B. Collect		C. Store, Integrate, and Access		D. Analyze			
A.1 Inventory, Condition and Performance Standards	A.1.a	Asset Inventory Data Model	B.1 Inventory, Condition, and Performance Collection	B.1.a	Inventory, Condition, & Performance Coverage	C.1 Databases	D.1 Data Exploration, Reporting, and Visualization		
	A.1.b	Asset Condition and/or Performance Data Model		B.1.b	Inventory, Condition, & Performance Automation			C.1.a	Efficient Storage
	A.1.c	Design Model Standards		B.1.c	Inventory, Condition, & Performance Quality			C.1.b	Database Linkages
	A.1.d	Location Referencing	B.2 Project Information Collection	B.2.a	Project Information Coverage			C.1.c	Document Linkages
A.2 Treatments and Work Standards	A.2.a	Treatment and Work Data Model	B.2 Project Information Collection	B.2.b	Project Information Automation	C.2 Asset Life-Cycle Data Integration Workflows	D.2 Modeling		
	A.2.b	Treatment and Work Location Referencing		B.2.c	Project Information Quality			C.2.a	Asset Management Data to Project or Work Order
	A.2.c	Process Documentation and Management		B.3 Maintenance Information Collection	B.3.a			Maintenance Information Coverage	C.2.b
A.3 Resource Allocation and Prioritization	A.3.a	Prioritization Factors	B.3 Maintenance Information Collection	B.3.b	Maintenance Information Automation			C.2.c	Project Development to Project Delivery
	A.3.b	Analysis Parameters		B.3.c	Maintenance Information Quality	C.2.d	Project Delivery to Asset Management Data		
A.4 Metadata	A.4.a	Data Dictionary Standards and Guidelines		B.4 Priority Criteria and Values Collection	B.4.a	Public Perception	C.3 Other Data Integration Workflows	E.1 Resource Allocation and Prioritization	
	A.4.b	Dataset Metadata Standards and Guidelines	B.4.b		Decision Maker Values	C.3.a			Revenue, Budget, and Expenditure Data
A.5 Governance	A.5.a	Data Stewardship				C.3.b			Demand and/or Utilization Data
	A.5.b	Data Standards & Guidelines Development / Adoption Processes		C.3.c	Environmental Data	E.2 Project Planning, Scoping, and Design	E.2.a Data-Driven Project Planning and Scoping		
	A.5.c	Data Collection Approval / Coordination Practices		C.4 Data Access	C.4.a			Field Access to Data	E.2.b Data-Driven Project Design
	A.5.d	Change Control (Systems and Data) Processes			C.4.b	Public Access to Data	E.3 Maintenance	E.3.a Infrastructure Maintenance	
		C.4.c	Access Security	E.3.b	Equipment Maintenance				
E. Act									

Kickoff Meeting

Kickoff Meeting Follow-Up Email Template

From: <Assessment Facilitator>

Date: <Date>

Subject: TAM Assessment Process Kickoff Meeting Follow-Up; <Process Focus>

To: <Members of Assessment Team>

Cc: <Project Sponsor>

Thank you for attending the <Process Focus> kickoff meeting.

In order to facilitate the completion of the upcoming self-assessment meetings, it is important for you to review the supplemental guidebook materials. These include the data life-cycle framework and the element-level response templates. It is also important to familiarize yourself with the digital tool.

Please find attached the meeting minutes and supplemental guidebook materials for you to review before our next meeting.

Here is a link to the digital tool: www.dataassessment.tam-portal.com.

Thank you,

<Assessment Facilitator>