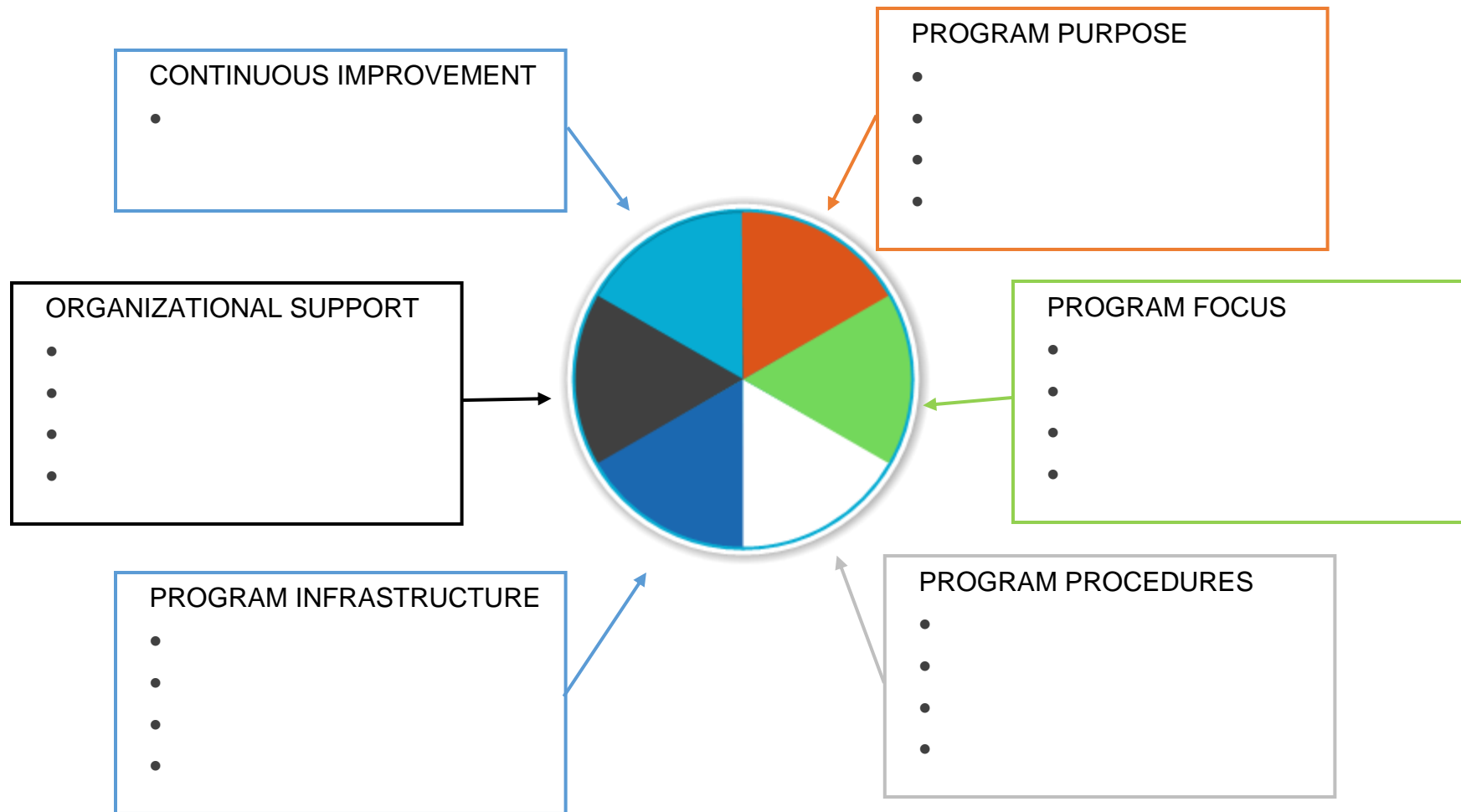


GUIDE TO THE PdM PROGRAM CHARTER ELEMENTS

Using the lesson as a reference, list the elements included in each Program Charter section:



PdM PROGRAM CHARTER AND STRATEGY

SAMPLE

| PROGRAM PURPOSE | |
|--------------------------------|---|
| Description | <i>The purpose of this program is to identify the strategy for a PdM program.</i> |
| Overview | <i>The PdM strategy will be used during identify, analyze, correct, and measure asset management activities.</i> |
| Long and Short-term Objectives | <ol style="list-style-type: none"> <i>1. assemble a working group of PdM stakeholders</i> <i>2. complete the 6 sections of the program charter as a group</i> <i>3. use the information from the charter to build the infrastructure, processes, procedures, etc. to measure activities and achieve our PdM strategy</i> |
| Problem Statement | <i>Current asset management practices are reactive and inconsistent and that results in higher costs, lower productivity and quality, potential safety concerns, and time & material inefficiencies.</i> |

Hint:
Refer to the self-assessment from Lesson Two to complete this section of the charter.

| PROGRAM FOCUS | |
|--------------------|--|
| Scope | <i>This PdM program will address equipment assets with a net asset value of more than \$5,000 and in active use at the Pedoma plant.</i> |
| Target Area | <i>To begin, the group will select 8 assets and apply the Identify-Analyze-Correct-Measure approach to draft a PdM strategy based on equipment maintenance plans (EMP).</i> |
| Measure of Success | <i>1. Metrics (MTBF, MTTR, and LCC) will be collected at the start of the program and collected at intervals along the way, based on the EMP.</i> |
| Milestones | <i>Target milestones for year 1 include:</i> <ul style="list-style-type: none"> <i>• calculating the risk priority number (RPN) for 40% of equipment assets</i> <i>• developing initial EMP for every asset with an RPN of at least 75</i> |

Hint:

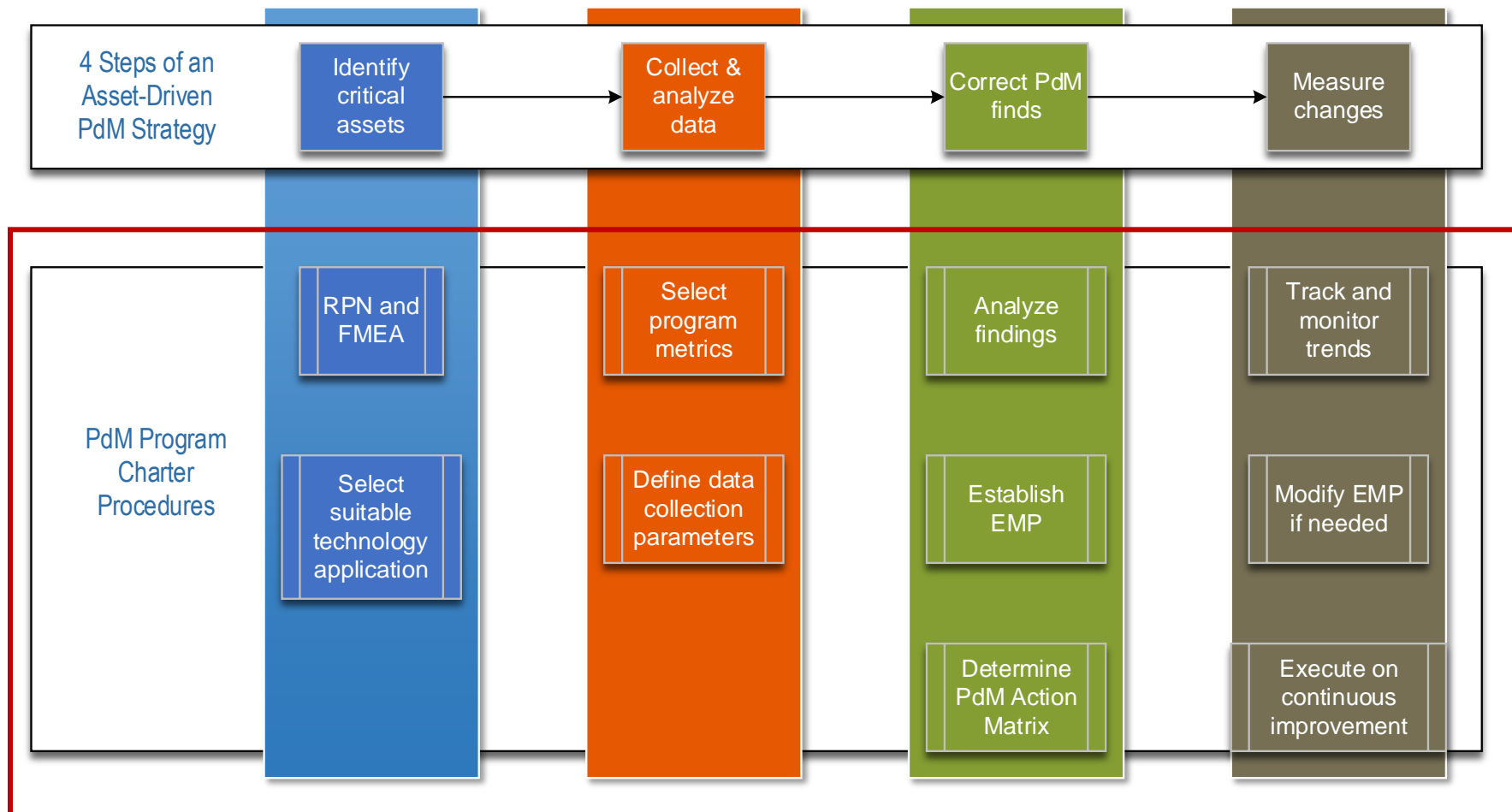
Be sure your Computerized Maintenance Management System (CMMS) is set up to track your chosen metrics.

It should be able to distinguish between regular preventive maintenance (PM) inspections and predictive maintenance (PdM) inspections. You'll want to be able to report separately on corrections/findings from each of those events.

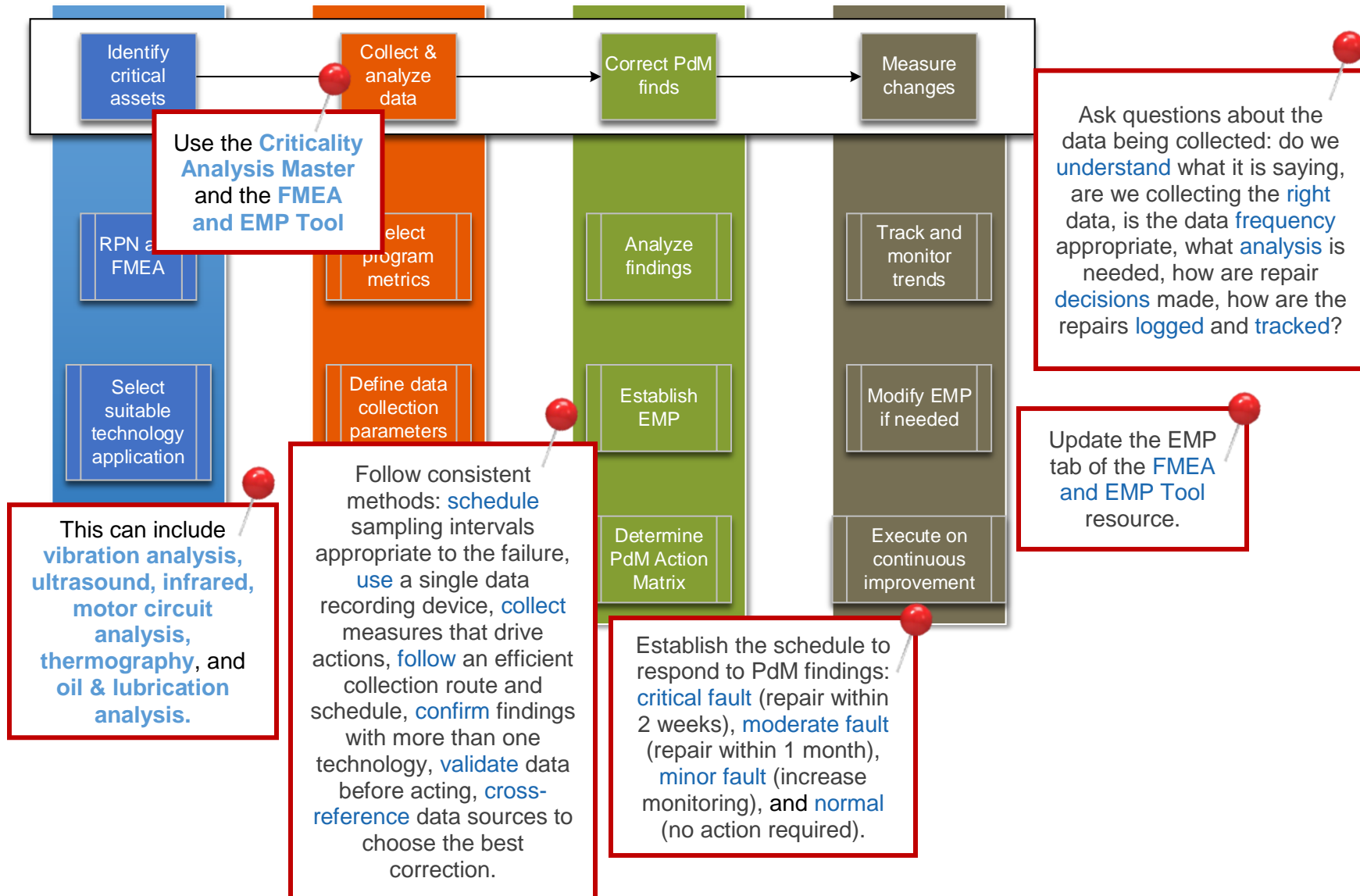
| PROGRAM PROCEDURES | |
|------------------------------|---|
| Processes | <i>The team will follow the Identify-Analyze-Correct-Measure process to create the EMP for each critical asset and maintain accurate data records in a computerized maintenance management system (CMMS).</i> |
| Methodologies | <i>criticality analysis, risk assessment, maintenance plans, action matrix</i> |
| Data Collection & Monitoring | <i>Frequency of rounds, routes, scheduling, data collection parameters, and ground rules will be determined by asset type.</i> |
| Data Analysis | <p><i>To be determined:</i></p> <ul style="list-style-type: none"> <i>- how often to report</i> <i>- what format will be used</i> <i>- which metrics will be included (asset reliability, program performance, financial performance)</i> <i>- who will analyze/interpret the findings</i> <i>- who should receive reports</i> |

See the two charts:
Procedures and **Methodologies**

PdM Program Charter: Procedures



PdM Program Charter: Methodologies



PROGRAM INFRASTRUCTURE

| | |
|-----------------------|--|
| Equipment Needs | <ul style="list-style-type: none"> tools and equipment for data collection and recording technology applications for vibration analysis, infrared visualization, ultrasound, oil analysis, motor circuit analysis, Eddy current testing |
| Personnel Needs | <ul style="list-style-type: none"> 2 teams of technicians proficient with multiple technology applications Equipment operators to assist with data collection Level 3 access rights for building 9 technician proficient with CMMS entry and reporting |
| Training Requirements | <ol style="list-style-type: none"> Confirm OSHA safety & PPE training Use of FMEA, EMP, RPN methods Operational training for existing or new analysis technologies Data collection practices |
| Internal Partners | <ul style="list-style-type: none"> - IT - accounting |

Hint:

By asking the right questions, you'll get all the information you need for this section:

- Is the CMMS set up and ready?
- Do we have the necessary testing and data collection equipment?
- How will the data collected be recorded?
- Will additional headcount be needed?
- Will schedules need to change to include time for PdM inspections?
- How will personnel be educated about the PdM program?
- Do we have sufficient, capable personnel?
- What additional training is needed for personnel to use data-collection equipment and testing applications?
- What process and communication plans need to be developed with our internal partners from IT, accounting, HR, training, procurement, etc.?

ORGANIZATIONAL SUPPORT

| | |
|--------------------------------------|---|
| Leadership Support | <p>Project sponsor: VP Plant Operations (US)</p> <p>Project leaders: Director of Maintenance, Director Operations, Director of Production, Senior Manager of Plant Accounting</p> |
| Stakeholder Roles & Responsibilities | <p>Complete the RASI/RACI chart to identify which team members are RESPONSIBLE, ACCOUNTABLE, SUPPORTING/CONSULTING, OR INFORMED for each task.</p> |
| Communication Plans | <p>The team will meet on the first and third Wednesday of each month during PdM program startup. Program updates and milestones will be communicated to the plant personnel at each monthly all-hands meeting.</p> |
| Program Team Management | <p>So as not to lose any momentum, team members are asked to appoint a delegate if they are unable to attend a meeting. After 6 months, the team will plan a de-brief of the program to make any course-corrections to the PdM program.</p> |

| | Plant Manager | Reliability Manager | Reliability Engineer | PdM Technician | Planner/Scheduler | Maint. Tech | Maint. Superv. | Contractor |
|------------------------------------|---------------|---------------------|----------------------|----------------|-------------------|-------------|----------------|------------|
| Communicate program vision & goals | R | S | S | | | | | |
| Communicate results to site | I | A | R | S | | | | |
| Review KPIs and improve | A | R | S | | | | I | |
| Collect data on route | | A | S | R | | S | | I |
| Analyze data and provide report | | | A | S | | | | R |
| Review PdM reports | | A | R | | | | | |
| Create repair work orders | | A | S | | R | | I | |
| Make repairs | | | S | S | | R | A | |

Hint:
Here's a portion of a sample RASI chart.
Be sure there is a responsible party for each task.

CONTINUOUS IMPROVEMENT

What's Going
Right? What
Should We
Keep
Doing?

What Isn't
Adding Value?
What Should
We **Stop**
Doing?

What Should
We **Start**
Doing?

Other Notes