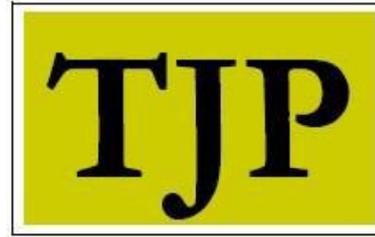


**CHRONOLOGY OF FACILITY MAINTENANCE
ASSESSMENT**
The Jethro Project



An internal assessment process is a collaborative endeavor between the management of the facility being assessed and the assessors. Full local management participation is necessary for the success of the effort. The facility audit agenda will normally adhere to the following pattern:

Pre-visit Preparation

- Notify site management of the assessment study and schedule dates, as well as agreement on post-assessment responsibilities.
- The team leader selects volunteers for Assessment Team Members.
- The leader Introduces the Assessment Team Members (Teleconference or email).
- Discuss assessment approach/strategy, included sites, and members' responsibilities; incorporate team members' suggestions.
- Define the scope and criteria of the assessment, as well as information to be collected by the assessors.
- The leader requests site information: number of facilities supported, list of facility assets, Facility Maintenance organizational chart with the number of craft employees, and current problem areas.
- Request from site management a summary of current procedures used for improving and maintaining facility assets, including custodial services.
- Request from site management facility outlays and budgetary levels for the past five years.

Opening Meeting

- Review the purpose of the assessment with the site Manager and staff.
- Introduce assessors and site contacts.
- Historical background of the operation.
- Safety requirements for assessors.
- Confirm and agree on the assessment agenda.

Field Inspection

- Use the Facility Maintenance Condition Report (Supplied by TJP) to inspect the site's facility assets (i.e., air compressors, HVAC equipment, electrical switchgears, boilers, fork trucks, roofs, fire systems, etc.), building interior and exterior, as well as parking lots, flag poles, lawns, fences, sidewalks, etc., as well as procedures used to ensure facility maintenance assets reliability and maintainability (i.e., preventive and

- predictive maintenance, planning and scheduling, equipment files - i.e., ASME certificates, relief valve testing records, maintenance manuals, and equipment drawings-, etc.).
- Document interviews with Facility Maintenance personnel, as well as observations of personnel interactions and meetings.
 - Identify assets by site assigned identification numbering system and nameplate information.

Assessment Quiet Time

- Summarize notes and findings for the closing meeting.

Closing Meeting

- Summarize and submit draft findings to the site management (Plant Manager, Maintenance Manager, and staff).
- Highlight the joint (Assessment and Management teams) recommendations.
- Discuss the available mechanism for supporting the assessed site in the short and long terms.
- Solicit responses from responsible parties.
- Document alternative recommendations.
- Document all comments
- Review key points for clarification.
- Encourage discussion.
- Inquire on the effect of externalities (external events outside of the site span of control) affecting facility assets and programs.

Follow up support

- Short term items, not to exceed twenty (20) man-days. The assessment team may facilitate the completion of selected short term deficiencies identified by the assessment.

Final Report

- Executive summary
- A. Purpose
 - I. Introduction
 - II. Objectives
 - III. Conclusions
 - IV. Observations and recommendations
- B. Format
 - Site response format

Participating Sites

Determine the participating sites' base on an agreement.

Probable Milestones (At Site)

Day 1	Introductory meeting/Start assessment).
Day 2	Data gathering/data analyses and summary.
Day 3	Final meeting/Preliminary recommendations.

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