



# *Sustainability* = **Proactivity**

## Comprehensive Maintenance Work Planning

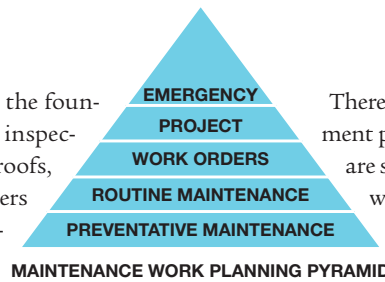
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**At its root**, sustainability is about prudent, efficient use of resources over time. Sustainability is resource conservation—and that's what facility maintenance is all about, or at least it should be. Effective maintenance work planning renders greater efficiency through safe, reliable, long-lived facility assets. Successful sustainability initiatives must include a comprehensive maintenance work plan. When considered in those terms, sustainability is really just a new spin on an age-old idea: to succeed, take care of what you have.

Sustainability in new construction renders ever-more sophisticated facilities, yet the retail maintenance industry places little emphasis on effective work planning that will allow for proper care of new or existing facilities. Indeed the retail facility maintenance industry today focuses greater attention on reactive services rather than proactive work planning.

The industry focuses on reactive service over proactive due to the absence of an effective maintenance work plan. Sustaining a safe, reliable and long-lived facility asset requires an effective work plan that strikes a balance between long-term care and day-to-day maintenance requirements. In this spirit, the retail store maintenance profession should commit itself to effective maintenance work planning principles.

To balance day-to-day operational requirements with long-term care, consider the Maintenance Work Planning Pyramid as a model for a comprehensive maintenance work plan. The planning pyramid emphasizes the proper order of maintenance work by type in relative proportion to the space occupied on the pyramid.



**Preventative Maintenance (PM)** serves as the foundation of the work plan, consisting of periodic inspections of equipment and building systems (i.e., roofs, exterior finishes, etc.) based upon manufacturers recommendations and best practices experience. A complete PM program should consist of:

1. Comprehensive equipment and building system inventory by site.
2. Standardized maintenance task lists specific for each piece of equipment.
3. Master maintenance schedule that summarizes the equipment inventory and inspection intervals as specified on the maintenance task lists.
4. Virtual Task Manager© (VTM) – or some other web-based system to schedule, notify, report and track recurring tasks.

**Routine Maintenance (RM)**, the second level of the Planning Pyramid, consists of daily required maintenance such as house-keeping, landscape maintenance, etc. Whether RM is outsourced or performed in-house, the program must provide a logical framework to define performance standards, supervise the delivery of service and bring a measure of accountability for all involved. A RM program includes many of the same elements as the PM program:

1. Standardized task lists to specify work to be performed.
2. VTM for scheduling and reporting
3. Standardized service tickets with milestone elements of the work specification in self-audit format that the service provider is required to review with maintenance supervision on a regular basis.

The elementary simplicity of a service ticket belies its effectiveness as a vendor performance tool. A service ticket is a single-page form that a service contractor should be required to fill out and present to an onsite person for their review and approval via signature. The service ticket should be written in self-audit format in order for the contractor to grade their performance based on milestone elements of the work specification. The contractor should be required to submit hardcopy service tickets along with invoice for payment.

The effectiveness of the service ticket lies in the basic truth there is no substitute for face to face interaction. By nature of self audit format and on site review the service ticket bridges the gap between corporate administered service contracts and on site contact. The level of one on one accountability safeguards against under performance and ensure objective vendor performance evaluations.

**Work Order Program (WO)**, a formal, documented (written or e-mail requests) maintenance request program, should exist to deal with the wide and varied requests typical of maintenance work. Without adherence to a formal WO program, service requests are lost, unauthorized and unjustified work is performed, maintenance falls out of synch with ever-changing objectives, and department effectiveness is compromised. Ideally, a WO program should include periodic performance reporting.

There are a multitude of very good maintenance management programs available today. Some are web-based, some are server-based, and some are literally at your finger tips without any investment required. If your current work plan lacks a formal WO, consider starting with a simple spreadsheet-style work order log. Popular spreadsheets offer robust sorting functions that provide significant visibility regarding how effectively you are serving requests relative to timeliness and priorities.

A formal WO is absolutely imperative for effective maintenance work planning. Arguably, it is the single most important element for the justification of increased investment in maintenance resources for any organization. By default, a work order log builds a work history that makes the case for future resource allocation. In addition, the work order log is the only effective way to sort through conflicting priorities to stay in synch with changing business objectives.

**Project Work** is the single greatest threat to executing a balanced work plan. Project work is defined as any project that takes one or more maintenance people a day and a half or longer to perform. By definition, project work competes for limited maintenance resources and, if not kept in proper proportion to the overall work plan, will undermine maintenance department effectiveness and brand credibility.

If all we do is serve the latest merchandising initiative of the day, the other critical elements of a comprehensive maintenance work plan will never be served. Loss of customer confidence from poor appearance standards and unreliable facilities will devastate any brand.

In order to keep project work in balance with the rest of the work plan, projects should be carefully justified relative to customer service, sales objectives, and appearance standards. If the project stands on its merit, then carefully detail the scope of work, define performance objectives, and weigh the value of self performing vs. outsourcing the project. Comprehensive work planning requires careful consideration to the overall impact that project work has on the total work plan.

**Emergency Work** will always exist in facility maintenance. No matter how disciplined one is to the work plan outlined above, there will always be emergencies. Weather events, mechanical failure, and executive orders are just a few things that result in emergency work.

However, if we adhere to a balanced work plan, keeping the various categories of maintenance work in relative proportion to the space occupied on the pyramid, the incidences of emergency work will comprise the smallest share of work performed.

A proactive maintenance plan will always be the most efficient, safest method, and it will provide for the longest life of your facility asset. Reactive maintenance, along with all of its inefficiencies, while never totally eliminated, can be greatly reduced through comprehensive maintenance work planning.

A comprehensive maintenance work plan is the key to any successful, sustainable workflow initiative.

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