

Instructions: The purpose of this tool is educational. The results are relative and for use by your organization and are validated. Fill out the date and the plant location which is being evaluated. Read the characteristic statement carefully. If your organization aligns with the statement, score a 10. If your organization does not align, read the characteristics of an organization who would score 5 and 1. Circle the description which best describes your organization. Total the scores by columns (10, 5, 1) and sum the totals. Divide the sum by 170 for a percentage. .85 or greater is world class performance, .50-.84 is proactive maintenance performance, and .1- .49 is reactive maintenance performance.

Date		Planning and Scheduling Prerequisite Assessment	Plant		
Number	Characteristic Statement	10	5	1	
	1.0 Commitment to a Proactive Culture				
1.1	A Facility mission statement or company policy statement recognizes that reliability is as important as quality and safety.		Mission Statement exists, but is not known by plant personnel	No Mission Statement	
1.2	The maintenance department annual plan is well communicated throughout the organization and supported by operational, engineering, and procurement partners.		Budget is activity based, developed and managed by Maint with input from Operation.	Very informal plan which is budget driven	
	2.0 Partnership Among all functions				
2.1	All functions in the business, R&D, Maintenance, Operation, Purchasing, H&R, QA, Engineering and Finance understand their role in achieving reliable capacity.		Maint., Operations and Engineering responsible for reliable capacity	Maintenance is responsible for reliable capacity	
2.2	Scheduling is viewed as the process which optimizes the organization's use of available resources to maximize customer service through managing business risks.		Operations and Maintenance run weekly scheduling meetings	Maintenance has no input to scheduling	

	3.0 Lead Time for managing a specific failure			
3.1	PM (inspection, rebuild and lubrication) have clear and concise instructions which include: the activity, defect identification, and actions to be taken.		PM are in place and are evaluate annually	Little or no PM's
3.2	Operators are trained to perform periodic (daily, weekly, etc.) inspections and cleaning to identify failures, perform minor repairs, and make adjustments.		Operators clean and perform change overs	Operators run equipment and maintenance repairs the equipment
3.3	The PM and PdM activities are viewed as investments and are continuously being improved and optimized to minimize or eliminate the consequences of a failure.		All critical equipment is covered by PdM and PM.	No process to proactively manage the consequences of failure.
	4 Information Base (CMMS)			
4.1	The CMMS system is properly implemented with the full capability of the system being achieved for identifying, prioritizing, planning, scheduling and executing work.		Work control and material management is highly functional.	Poor Equipment Identification and repair histories cause data to be inaccurate.
4.2	The CMMS is completely integrated with other business systems: Human Resources, Finance, Quality Assurance, Engineering and Operational scheduling.		Work control, inventory management, procurement, and planning	Work Request and Work orders only.
4.3	The CMMS has proper storeroom and procurement functionality to assist in maximizing maintenance workforce productivity and lower unscheduled downtime.		Planners are able to reserve parts for jobs and develop BOM for work order.	No visibility of store room inventory or part status in CMMS
4.4	CMMS reporting functionality is robust being able to provide management, reliability engineering, status, stores, equipment history and performance reports.		Maint personnel are using reports to optimize resources and productivity.	Reports are made on work request and work order counts
	5 Organization			
5.1	Roles and Responsibilities are clearly defined for each process step of the MRO work cycle and each one in the organization supports the other in being successful at executing their responsibilities.		Roles and Responsibilities for maintenance are clear and being executed	Roles are assumed and operational meetings are finger pointing sessions
5.2	A highly skilled workforce is viewed as a competitive advantage. A structured systematic approach is followed for hiring, skills development and performance management.		Annual development planning per individual, clear Job task analysis	Few hiring standards, no testing and little developmental planning

	6. Work Measurements				
6.1	A very clearly understood planning process exists which requires accurate estimates for job duration and labor - hours by craft. This information is used for input into the production scheduling process for forecasting capacity.			A planner exists and is actively developing job plans and scheduling weekly work.	Work request are distributed to technicians to plan, schedule and execute
6.2	Execution work process includes providing feedback on all aspects of the job plan and to document deviations from estimated and actual work.			Feedback is being given and incorporated on 50% of the planned job	Feedback is a low priority because technicians are responsible for work
	7. Backlog				
7.1	Backlog is measured in Labor hours and is the total net work load of the work not yet completed. Backlog is used to optimize productivity of the workforce and is proactively managed to minimize business risks and costs.			Average labor hours by craft are being used on pending work. Critical assets have good estimates	Work orders are managed by numbers and plant areas.
7.2	Workforce leveling, outside services and overtime management are directly tied to backlog.			Backlog graphs are used weekly to determine overtime needs with labor utilization.	Overtime is managed by area or immediate need in supporting area technicians.
Theoretically		Total Category Score:			
1.0 -.85	World Class		Sum of Scores:		
.50-.84	Proactive Maintenance- Investment is being made in planning and scheduling		Calculation:		/170
.01- .49	Reactive Maintenance - Very little investment being made in planning and scheduling.		Percentage:		