



Maintenance Planner Training

Tim Beavon | Pragma Academy

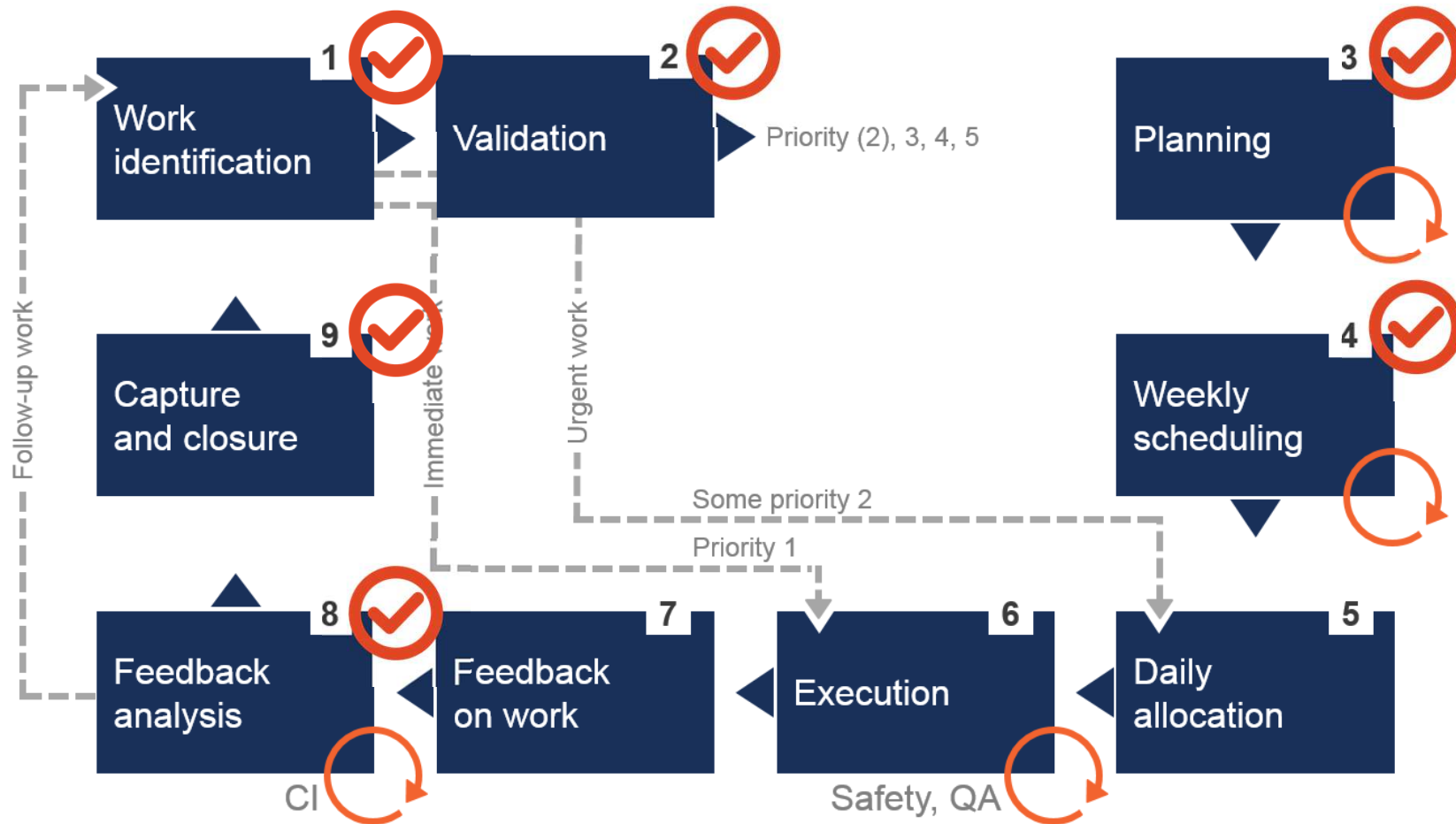
June 2018

Content

- Why a Maintenance Planner Qualification?
- What is the Maintenance Planner Qualification?
- What must be done to complete the qualification?
- What is the current status of the qualification?
- Questions?



Why a Maintenance Planner Qualification?



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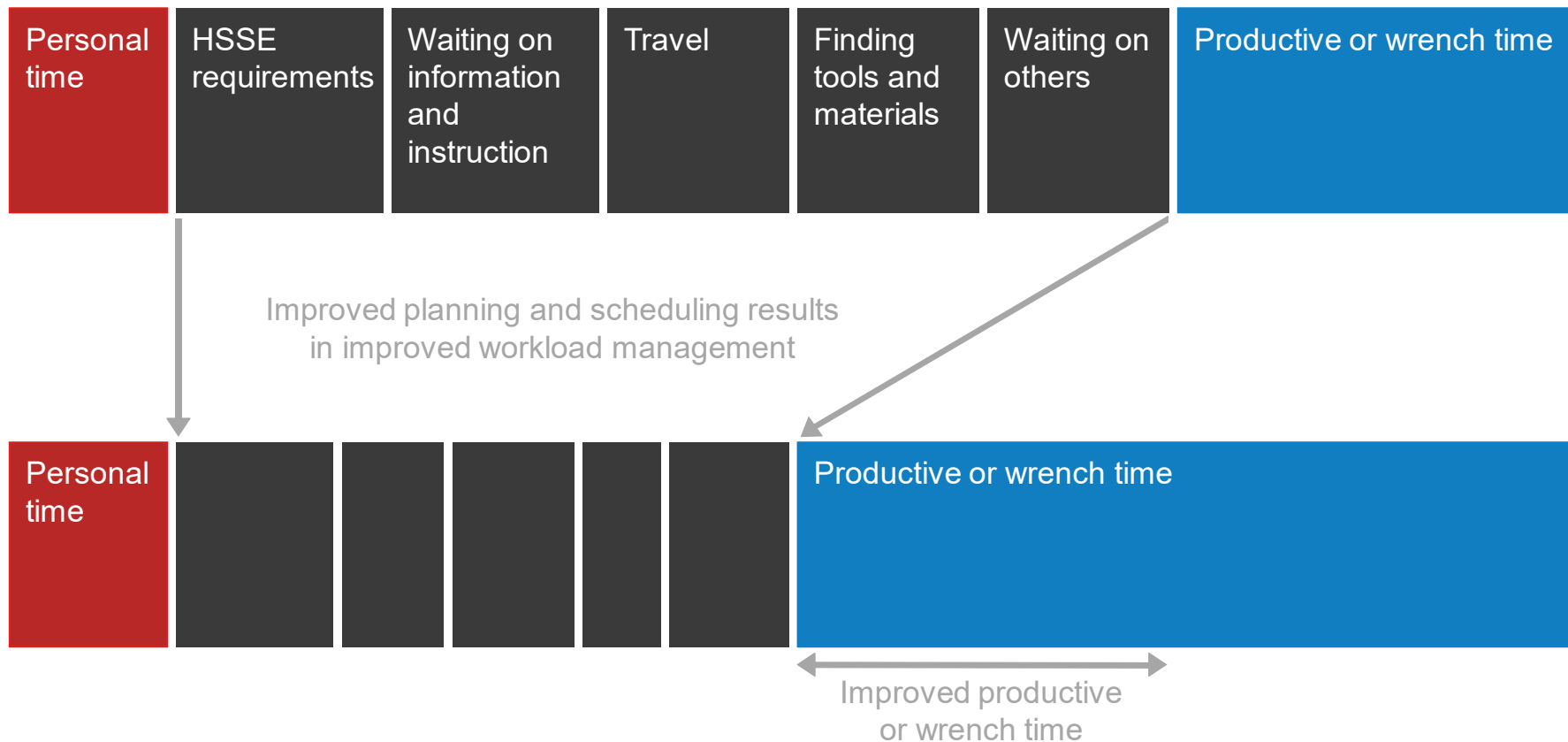
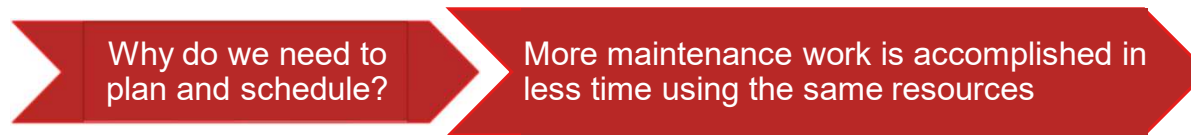
The role of a maintenance planner is to improve the productivity of the maintenance staff and reduce the downtime for required maintenance:



- 1. Create a prioritised and coded list of work orders**
Verify work requests; PMs from EAMS; follow-up work; prioritise / code WOs
- 2. Scope and plan large maintenance work**
Scope the work; estimate complexity / risk / duration; identify resources required
- 3. Schedule the work with Maintenance and Production**
Prioritise/group work; confirm resource capacity; Production slots
- 4. Prepare / Secure resources for the work to be done**
Spare parts; special equipment; contractors
- 5. Update EAMS master data as required**
Asset information; BOMs; std task details, frequency, resources, duration
- 6. Create ad hoc reports (as required)**
Management queries, preparation for audits, input to RCAs
- 7. Plan for a shutdown (if applicable)**
Scope the work; schedule with critical path; resource levelling; update plan



Why a Maintenance Planner Qualification?



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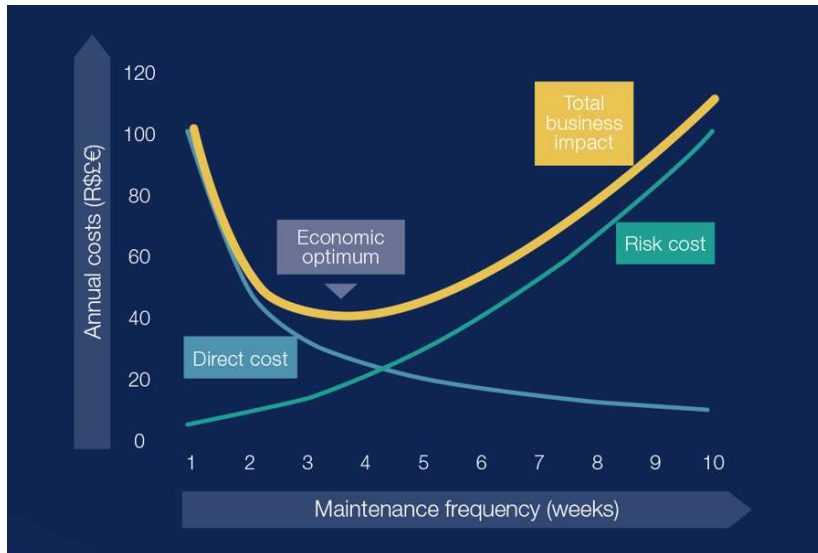


Image: From PAS 55 economic optimum approach versus balanced approach

Cost and Risk. Getting the balance right between asset economic exploitation and asset care. Asset care centric organisations benefit from deferred capital investment.

Delivery and Risk. Delivering sustainable asset reliability, through optimised resource utilization. Fun fact: One planner can optimise the efficiency of up to twenty tradespeople.*

Quality. Optimised work instructions, tools and spares correctly identified enables freed-up workforce to be readily optimised for more complex jobs and root cause failure analysis.

* Reference T. O'Hanlan – Failing to Plan Negates Maintenance Efficiency

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What is the Maintenance Planner Qualification?



The CHIETA has registered an Occupational Certificate: Maintenance Planner with the QCTO.

- The qualification is aimed at NQF Level 5 and has 261 credits
 - It will take the average learner about two years to complete
- Prerequisite entry requirements (one of the following):
- NQF Level 4 Mathematics and Physical Science
 - NQF Level 4 with three years experience in maintenance planning
 - Qualified tradesperson

The qualification is aimed at:

- Tradespeople who aspire to pursue a career as maintenance planners
- Supervisors of tradespeople with no formal maintenance planning qualification
- Maintenance planners, maintenance schedulers, shutdown coordinators and shutdown planners who do not have a formal qualification

Provision has been made for Recognition of Prior Learning (RPL).



What is the Maintenance Planner Qualification?



Outcomes

- Identify work through notifications and work requests
- Scope and plan work in accordance with identified notifications and work requests
- Schedule planned activities
- Coordinate the execution of tasks
- Close out documentation
- Review the execution outcomes of the work management process
- Maintain master data



What is the Maintenance Planner Qualification



Learning outcomes

- A practical outcome for shutdown planning
- Knowledge and soft-skills around essential non-technical skills that planners require, eg.:
 - Problem solving skills
 - Verbal and non-verbal communication
 - Facilitation skills
 - Time management skills
 - Coaching and mentoring skills
 - Documentational control
 - Managing conflict
 - Negotiation skills.

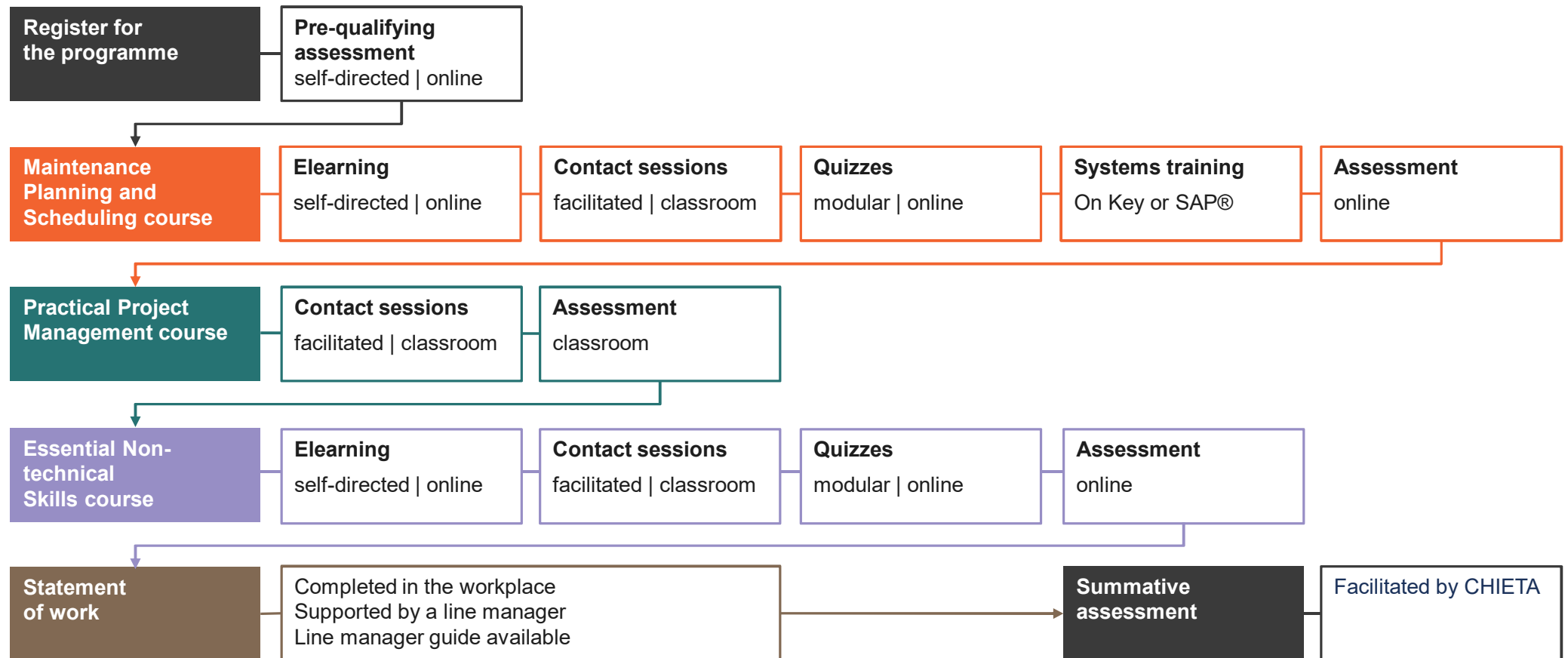


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Example: The Maintenance Planner Qualification Journey



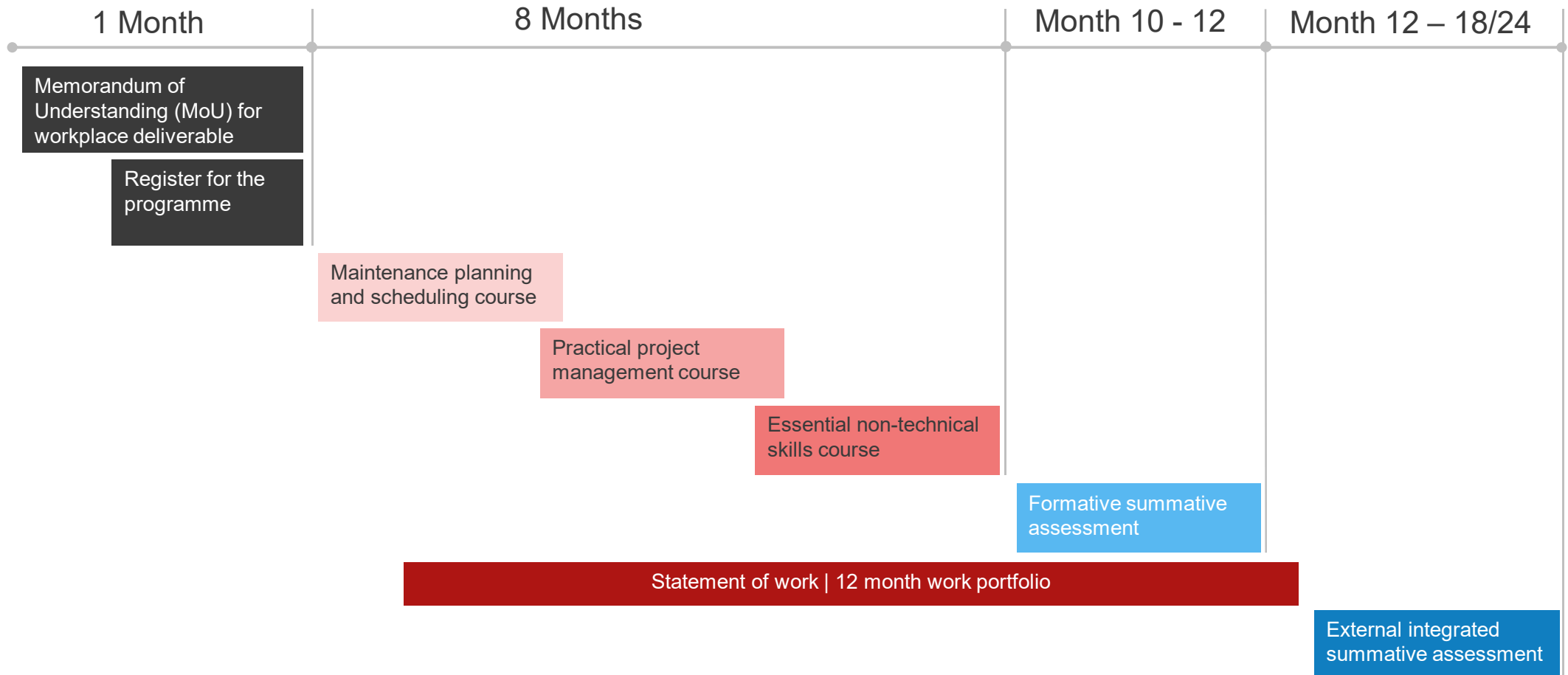
What must be done to complete the qualification?



- Prior to being able to register, learners must have a [memorandum of understanding](#) with an employer or workplace.
- From registration to the final formative summative assessment the programme is coordinated by a [Skills Development Provider](#) (SDP).
- The objective of the SDP is to ensure that learners are effectively prepared for the [External Integrated Summative Assessment](#) (EISA) to be administered by CHIETA.
- Access to the EISA is only possible once the portfolio of evidence for the [statement of work](#) has been completed.
- Quality assurance of the portfolio of evidence is the responsibility of the [SDP and workplace](#) via the MoU.



What must be done to complete the qualification?



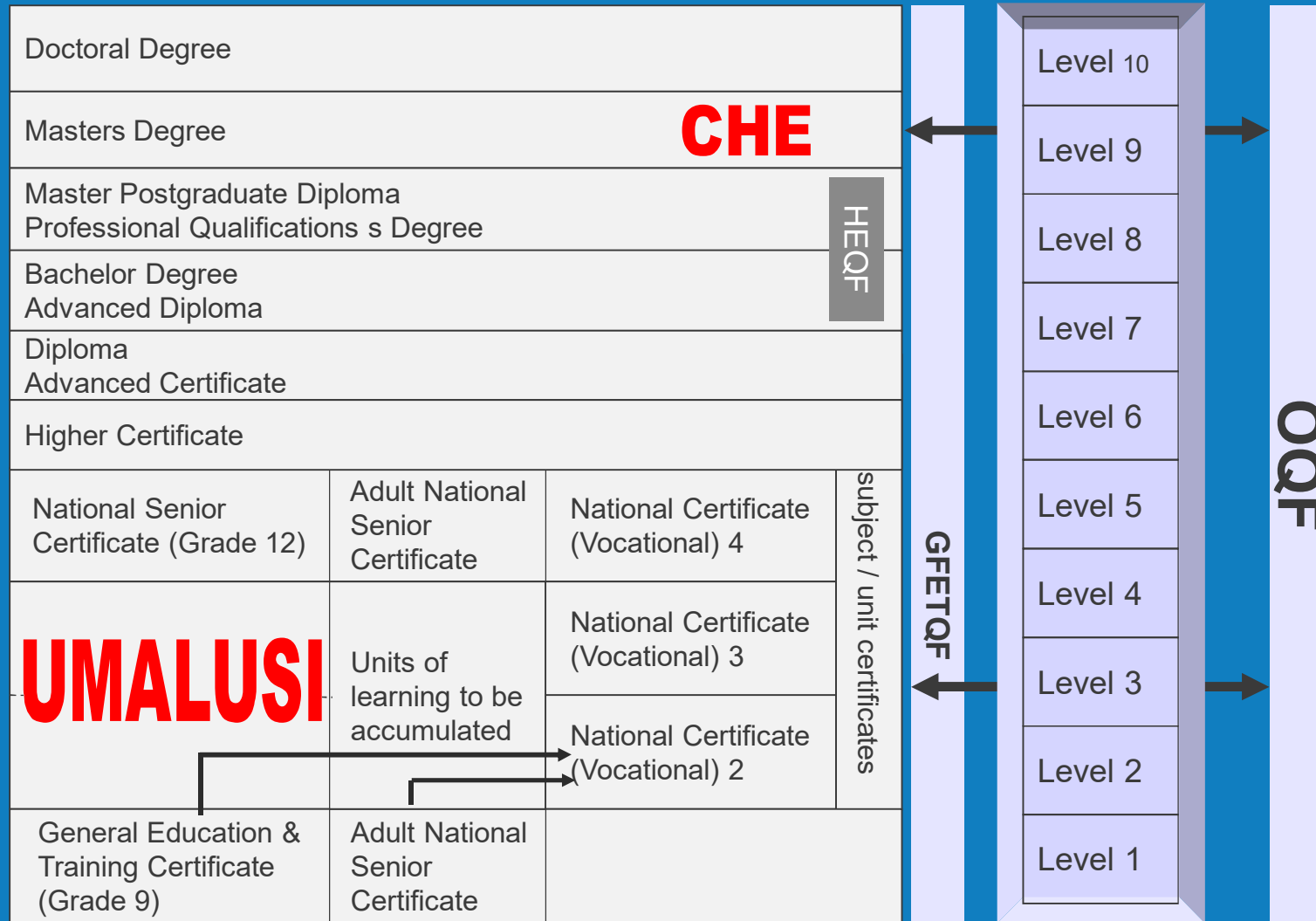
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Occupational Qualifications Framework

NQF



OQF

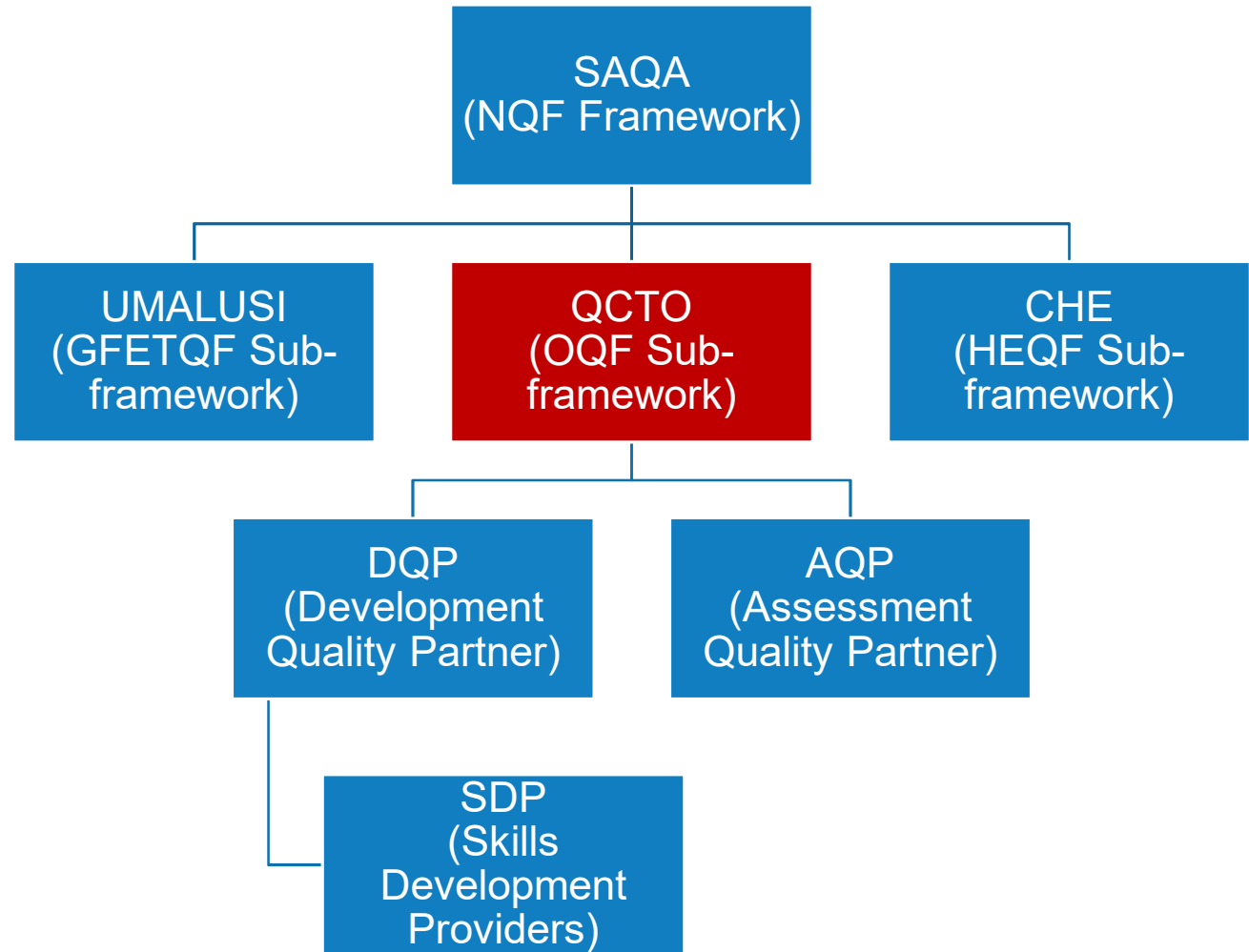
Occupational Certificates

QCTO

In addition to the SAQA Level Descriptors - LARF

<u>L</u>evels	T ypical <u>a</u>ctivities	<u>R</u>ole	W orkplace <u>F</u>ocus	T ime span of <u>D</u>iscretion
10	Envisioning future scenarios	Visionary leadership	Future shape of organisation, industry, profession	10-15 years
9	Set and implement strategies	Leading and directing	The 'business landscape' or profession	5-10 years
8	Manage or design systems	Resource management	Policy, resource allocation	3-5 years
7	Manage or design processes	Changed practices	New technology, systems	1-3 years
6	Develop and implement changes	Optimisation	Improvements	6 mth -1yr
5	Maintain efficiencies	Stability and consistency	Systems	3-6 mth
4	Setup processes and solve process problems	Process management	Process data	1-3 mth
3	Adjust, maintain and oversee	Procedures	Productivity	1wk
2	Monitor, support	Operations	Machinery	1day
1	Perform elementary tasks	Task	Machines, tools	

Occupational Qualification Role Players



Current Status of the Planner Qualification



- The qualification has been registered by **CHIETA with the QCTO** and the deadline for comments passed in February 2018
- The qualification is available from the QCTO website:
<http://www.qcto.org.za/index.php/maintenance-planner>
- SAQA **approved** the qualification on **01 March 2018** (SAQA ID Number: 101874)
- A process will be lead by CHIETA to encourage organisations to become registered as **Skills Development Providers** (SDP)
- Both QCTO and SAQA are very constrained for resources so **timelines** are difficult to predict

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Thank you



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SMARTER approaches in Asset Management



FAQ?



FAQ

- Will I get the credit if I do it now while the accreditation process of the Skills Development Provider is not accredited?
- When do we expect the Skills Development Provider to be approved by QCTO?
- Will I get credit if I am not in the Chemical SETA?
- I have been a planner for 12 years – can I get RPL?
- Do you have to be an artisan to do it?
- Can I do only a subset of the Planner training?
- Our planners also need additional skills (like problem solving) – is it possible to include it as well?
- Etc

