FINDING THE HOLY GRAIL: THE INTEGRATION OF CAPITAL AND MAINTENANCE PLANNING

SLAM streamlined asset management

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AGENDA

- Introduction
- Integrating Capital & Maintenance
- Plotting Your Course
- One Final Thought
- Q & A, Resources & Next Steps

INTRODUCTION

Bill Roth

President & CEO of Roth IAMS & Co-Founder of SLAM Technologies

- Over 30 years of experience collaborating with education institutions across North America on all aspects of facility and infrastructure asset management
- Active member of many industry associations like FEFPA, APPA, NSPMA, NASFA and many others

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FCAS ARE JUST THE BEGINNING OF INTEGRATED ASSET MANAGEMENT

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WHERE WE ARE FOCUSING TODAY

INTEGRATING CAPITAL AND MAINTENANCE DATA

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IMAGINE IF YOU WOULD…

- While assessing a Rooftop Unit being able to see relevant failure history and Preventive Maintenance (PM) details for that Unit
  - Allow you and your consultants to make more informed decisions about renewal timing
- Pulling up a Work Order to do PM on a system, but seeing that it is scheduled for replacement within a year
  - Reallocate O&M resources to equipment that will "be around longer"

WHAT IS STOPPING US?

Very few organizations have found any significant link between the O&M and Capital

- Siloed Organizations
- Competing Incentives
- Quality Data
  - Getting it & Maintaining It
- Momentum
- Senior Staff/Management Turn-Over
- Software
- Others?

FIRST THINGS FIRST…

YOU NEED TO BE TRACKING WORK ORDERS AGAINST INDIVIDUAL PIECES OF EQUIPMENT

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A QUESTION FOR YOU…

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Who is tracking work orders against individual pieces of equipment?

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WHAT WE SEE TOO OFTEN

- Tracking Work Orders at the Building-Level
- Tracking Work Orders at the Equipment Type (e.g. HVAC. AHU, etc.)
- Only Tracking Reactive Work Orders
- Not Completing Work Orders, no matter how they are tracked
- Others???

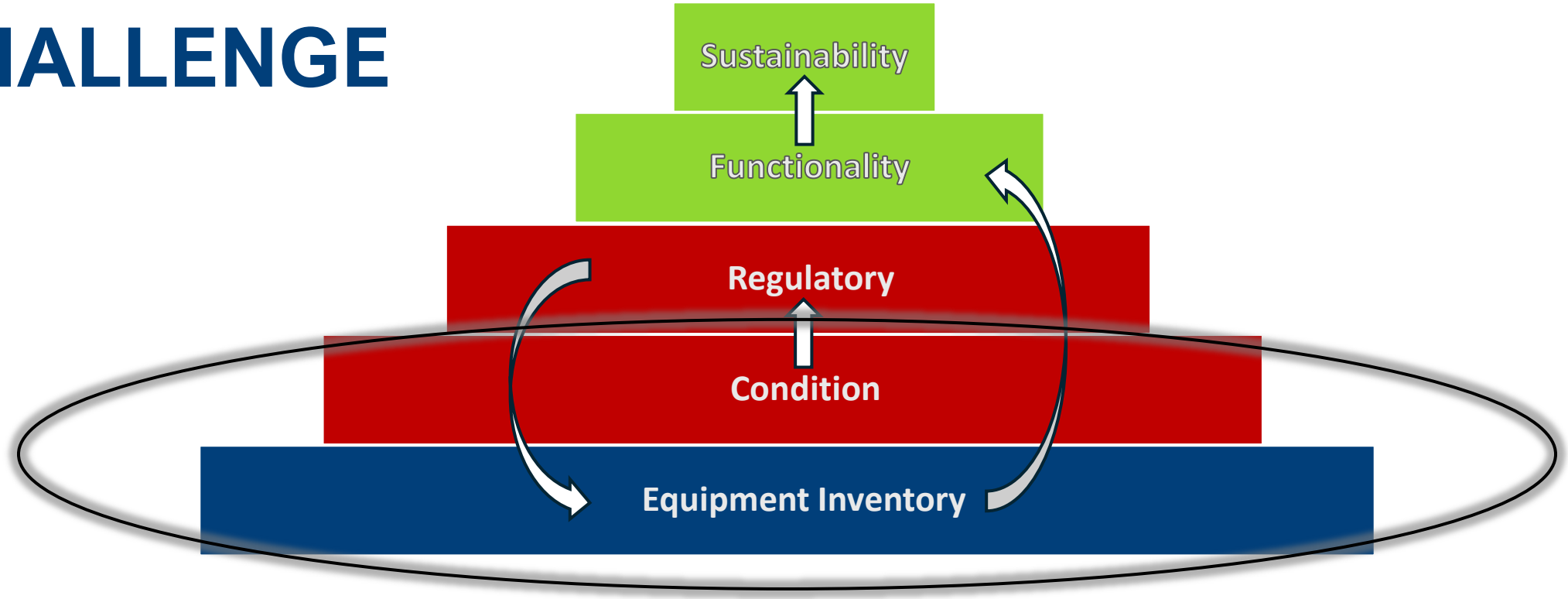
WHY THIS MATTERS

When we don’t have work orders tracked at the equipment level and we are not closing out completed orders, we are left to…

IF YOU LIKE IT THEN YOU SHOULD'A PUT A TAG ON IT!

- To track work orders to individual pieces of equipment, you need to have a detailed equipment inventory to track work orders against
- While you're at it, put a tag on it!
  - What's in a number?

THE DATA CHALLENGE



THE DATA CHALLENGE

- O&M is based on Equipment Level Data but only for some elements within a building
  - Generally mechanical and electrical
- Capital is based on Element-Level Data for all elements within a building
- The data overlaps, just at different levels of granularity
  - Rarely connected or linked within an organization

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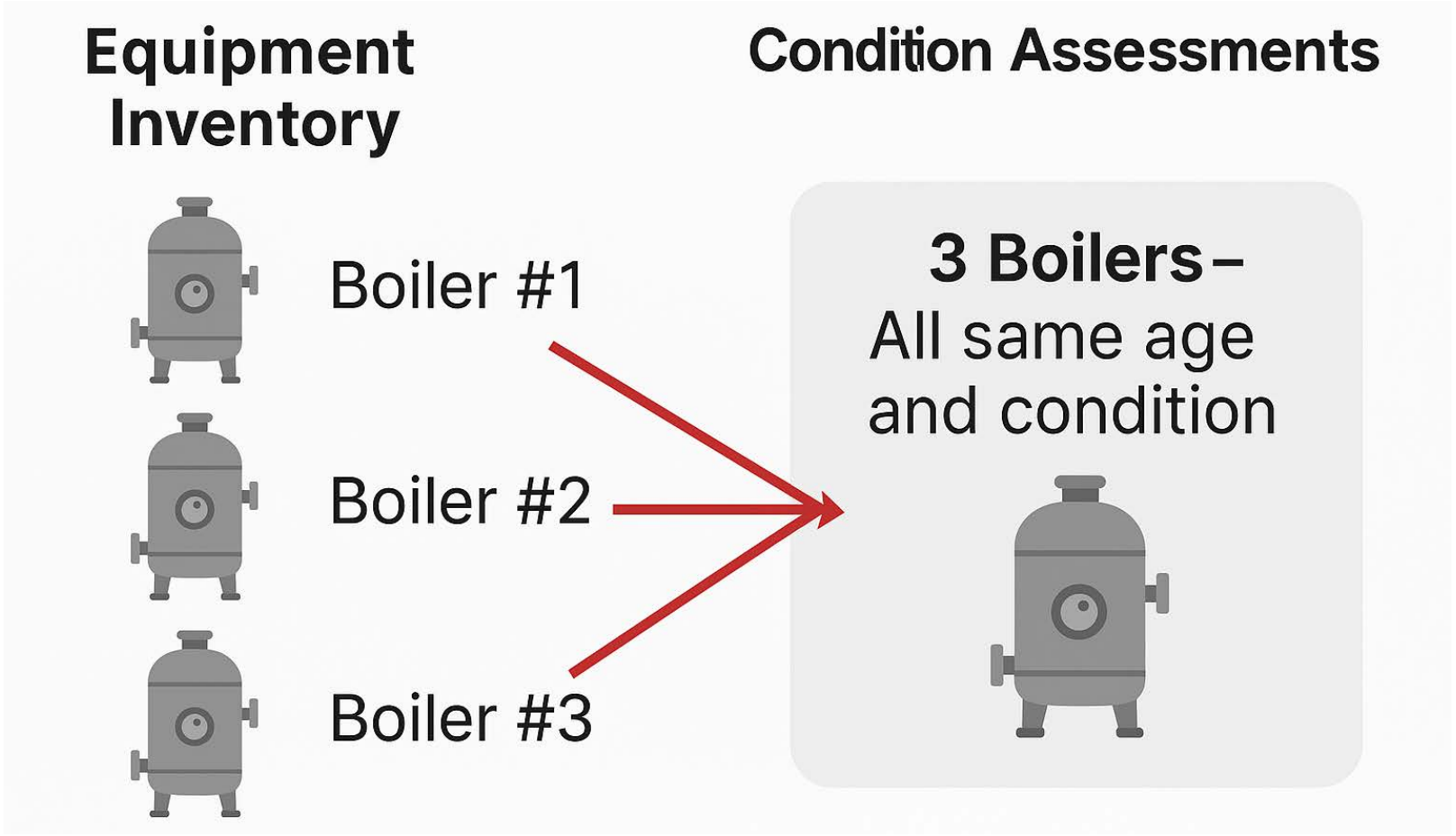
THE SIMPLE MANY-TO-ONE SCENARIO



THE COMPLEX MANY-TO-ONE SCENARIO

Equipment Inventory

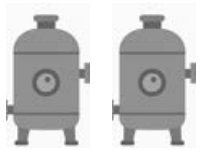
Boiler #1

Boiler #2

Boiler #3

Condition Assessments

Two Older and One Newer Boilers – Qty 2 – Old



Boiler – Qty 1 - New

MANAGING THE MANY-TO-ONE SCENARIOS

- Gets even more complicated with other elements, where there can be many more pieces of equipment, often hidden from plain sight

- The sheer volume of equipment data and work order data can be overwhelming

PLOTTING YOUR COURSE

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PLOTTING YOUR COURSE

First, you need a data strategy

- How will I organize it?
- How will I get it?
- Where will I put it?
- How will I maintain it?

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What is Your Data Strategy?

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PLOTTING YOUR COURSE

- What O&M data is relevant?
  - Not all work orders impact capital
    - Leaky Faucets, Too Hot/Too Cold, etc.
  - Avoid the “Needle in a Haystack” Approach
  - Work Order creation & review process is key to consistency
    - Assuming users can create work orders, you need some form of experienced screening to determine which are capital-relevant

PLOTTING YOUR COURSE

- Need to create a “link” between your Computerized Maintenance Management System (CMMS) and your CAMS (Capital Asset Management System)
  - Need to speak the same language – Uniformat II
  - Need visibility of relevant data between systems
- What other systems are relevant and need to be integrated
  - Financial/ERP
  - Space Planning
  - Other?

PLOTTING YOUR COURSE

Develop Parent and Child Relationship between Systems

- Don’t want the same data in two (or more) different databases
  - One draws that data from the other
- Need a clear workflow
- How frequent is data passed back and forth?

A QUESTION FOR YOU…

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Anyone feeling overwhelmed by all of this?

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HOW TO GET STARTED

How do you eat an elephant?

- One bite at a time…
- Pick one or two Elements/Equipment Types or one of two buildings to pilot
- Get your software providers talking

ONE FINAL THOUGHT

Q & A

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FOR MORE THOUGHT LEADERSHIP
SCAN THE QR CODE!

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THANK YOU FOR ATTENDING

Connect with us directly!

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