

Maintenance Planner/Scheduler Position Description

Title: Maintenance Planner/Scheduler

Reports to: Maintenance Manager

Position Scope: The primary role of the maintenance planner / scheduler is to improve work force productivity and work quality by eliminating, in advance, potential delays and obstacles through proper planning and coordination of parts, machine time and manpower.

The planner / scheduler is responsible for the planning and scheduling of all maintenance work performed in the area to which he/she is assigned. He/she maintains liaison and coordination between the production and maintenance organizations; maintains appropriate records and files to permit meaningful analysis and reporting of **results of completed work**.

Responsibilities and Duties in the performance of his/her duties, the planner / scheduler...

1. Is the principal contact and liaison person between the maintenance department and the plant departments served by maintenance and ensures that the production areas or functions to which he/she is assigned receive prompt, efficient and quality service from the maintenance function and ensures the maintenance function is given the opportunity to provide this service.
2. The planner receives all work orders from the requesting departments of the areas to which he/she is assigned – including those for emergency work, which are logged and passed to the appropriate maintenance supervisor for immediate attention. After forwarding emergency work orders, the planner performs a search of his databases for any previous planning information pertinent to the emergency work.
3. Reviews and screens each work order to see that it has been properly filled out:
 - a. Work scope clearly described
 - b. Check if the priority and requested completion date are realistic and provide practical lead-time
 - c. Charge numbers and other coding are complete and accurate
 - d. Authorization is proper
 - e. Discusses the details with the originating department as appropriate
4. Makes any additional sketches diagrams, etc., necessary to clarify the intent of the work order.
5. Ensures that work requested is needed. If need is questioned and not readily resolved with production or requesting personnel, refers the work order to the maintenance manager.
6. Reviews with engineering those work orders requiring engineering design. (Maintenance work orders which can be planned out but which require participation by shop or functional crews are copied (cross-order) and provided to the appropriate planner for planning of the supplemental work)
7. Examines jobs to be done and determines best way to accomplish the work. Consults with requester or maintenance supervisor when necessary.
8. Obtains blueprints, drawings, instructional manuals and special procedures, as needed, from files or other sources. Makes any additional sketches, diagrams, etc., necessary to clarify the intent of the work order.

9. Identifies and obtains (requisitions, orders, kits as appropriate and in keeping with procedures) determinable materials, entering material needs on the work order. Determines if critical items are in stock by verifying availability with stores.
10. Ensures the safety needs are given a top priority in work planning.
11. Estimates jobs showing sequence of steps, the number of mechanics and required man-hours for each step. Lists determinable materials and any special tools or equipment needed.
12. Estimates cost of each work order in terms of direct labor, materials required and total cost.
13. Maintains backlog files of work orders waiting scheduling in accordance with their priority limits with an estimated completion date. Those unplanned, requiring engineering, waiting for materials, waiting for downtime, etc., are filed accordingly. When ready for scheduling, work orders are filed by supervisor by required completion day. Ideally, this filing is accomplished within a computerized system.
14. Once a job is planned and estimated, prior to scheduling, verifies the availability of parts, materials and special tools required for its execution.
15. Planner should have complete knowledge of each department's PM workload in order to better schedule work orders in that area.
16. Reviews the estimate of the current day's schedule status and forecast of manpower availability on a daily basis.
17. Develops a maintenance work schedule for the maintenance area supervisor. From the backlog files for each crew, selects a group of work orders with manpower requirements matching the capability of the identified work forces, taking into account any work carry over from jobs previously scheduled. Identifies any known skill requirements and makes such arrangements with the other planners.
18. Allocates manpower and coordinates these requirements through maintenance supervisors and the maintenance manager.
19. In the selection of jobs for scheduling, meeting the deadlines established by the requesting department and maintaining preventive maintenance schedules is essential. If any work orders cannot be scheduled within the prescribed priority lead time, the requesting department management and the requester are promptly notified so that appropriate action can be taken to get the work done in a satisfactory and timely manner.
20. Attends meetings with the production planning department and participates in the overall plant scheduling of the following week's work, and negotiates for downtime "windows" during which preventive and corrective maintenance requiring downtime can be performed. Finalizes own schedules for which he/she is responsible, ensuring that the work scheduled balances with the man-hours available so that a full day's work is provided each person.
21. Recommends equipment to be included in preventive maintenance programs.
22. Plans and schedules preventive maintenance work in coordination with production and maintenance supervisors.
23. On the basis of firm work schedules, coordinates requisition of all predetermined parts, materials and special tools and ensures that equipment to be worked on will be available and ready. Arranges for any safety inspection, fire and standby watch.
24. Issues approved schedules together with relevant work orders and other planning documents to area supervisors. Discusses "planning packages" as necessary with special instructions or considerations to be observed in the execution of the jobs and reviews new jobs coming up in the future. (All work orders, including emergencies for tracking purposes only, come through the planner)
25. Follows up to ensure the completed schedules and work orders are returned at the proper time. Carefully reviews completed schedules and corresponding work orders submitted by the maintenance area supervisors and monitors work order progress for any reports necessary.

26. In accordance with standard practice, provides the clerks with all documents for reporting or closeout.
27. At all times, keeps advised of the status of standing work orders, of minor maintenance and of logbook jobs.
28. Promotes the conservation of energy.
29. Maintains close contact with the other planners to ensure coordination of complex multi-skill field and shop jobs.
30. Schedules weekly meetings with the production supervisors and the maintenance supervisors concerned with the areas for which he/she is responsible, consulting them regarding facilities or equipment to be maintained. Makes recommendations to production concerning long-range maintenance needs and, in collaboration with production, prepares a weekly forecast of all jobs expected to be scheduled for the following week. Where justified, solicits work orders for relatively minor corrective maintenance in order to avoid major repairs at a later date.
31. Maintains an open package of schedulable work orders, which require equipment to be shut down so that some or all of them can be performed in the event of an unscheduled shutdown of that equipment. These unscheduled shutdown lists are prepared, reviewed and updated weekly.
32. Develops a file of standard work orders (plans) for regularly recurring repair jobs, based on historical experience, to simplify the planning process.
33. Reviews with the maintenance area supervisors the actual labor expended versus estimated labor and material used for completed jobs, in order to determine corrective measures needed to improve the accuracy of estimating and improving methods of doing work.
34. Assists maintenance and production management in periodically analyzing costs and, where necessary, recommends corrective action needed to reduce maintenance costs.
35. Keeps the maintenance manager properly informed on all abnormal or critical situations and seeks advice on matters outside of the planner's knowledge or authority.
36. Make recommendations for system improvement.
37. Maintains necessary records / files and prepares / distributes meaningful and accurate control reports.
38. Performs other tasks and special assignments as requested by the maintenance manager.

Position Goals: The Planner / Scheduler has the following primary goals:

1. To ensure the production areas or functions that he serves receive the prompt, efficient and quality service from the maintenance function they need in order to operate at a high level of efficiency.
2. To ensure the maintenance function is given the opportunity to provide production with the service it requires.
3. Accurately define and estimate work requests.
4. Properly prepare and distribute meaningful control reports.

Relationships: The Maintenance Planner...

1. Reports to the Maintenance Manager.
2. Works closely with production supervision.
3. Works closely with maintenance supervisors.
4. Works closely with stores and purchasing personnel.
5. Maintains good working relationships with all other organizational units in the plant.

Requirements, Qualifications and Selection Criteria: The Maintenance Planner / Scheduler must:

1. Have a mechanical / electrical background (necessary) and technical school background (desired).
2. Have adequate craft knowledge to estimate man-hours and materials and to visualize the job to be performed.
3. Should have good oral/written communication skills.
4. Must possess a demonstrated high degree of tact in dealing with both seniors and subordinates.
5. Possess higher than average administrative and mathematical skills, together with a willingness and ability to organize and process paperwork
6. Have – or is able to acquire – a working knowledge of personal computers in a reasonable training period (typing skills helpful)
7. Have well developed planning and organizational skills.
8. Possess the ability to understand what constitutes good instructions
9. Possess the ability to read blueprints and shop drawings
10. Have an acceptable ability to produce easily understood sketches
11. Possess a thorough understanding of the proper use of work orders, priorities, scheduling techniques, etc.
12. Possess the ability to keep multiple jobs in controlled motion—simultaneously.
13. Possess the ability to bring about order—from chaos.
14. Have a mind-set and commitment to customer service.
15. Possess a personal style and level of capability that will command respect within both maintenance and operating organizations.

Source: Alcoa Mt Holly – World Class Maintenance

Maintenance Planning and Scheduling Workshop “Live” and “Virtual” at Southern Wesleyan University’s Bryant Lodge

February 8-10, 2022

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Information? rsmith@worldclassmaintenance.org



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