PLAYBOOK LIBRARY FRAMEWORK

example

AGENDA

Safety Moment

What is a Playbook?

Playbook example and explanation of components

Framework

Priority Playbooks

Production Schedule

example

SAFETY MOMENT – Hearing Protection

- **Take everyday noise protection care –** Wearing high-quality industrial earplugs or ear muffs helps protect your ears and your hearing.
- **Avoid loud environments –** Computer labs and construction zones are two environments that regularly cause hearing damage, it can happen in any loud work environment around machinery, large vehicles, etc. Protect your ears and avoiding intense volumes will help in noise protection.
- **Quit smoking and keep your blood sugar in check –** Smoking doesn't just damage your cells throughout your body, including those inside your ear canal. Get your blood sugar levels checked regularly by your doctor to address any imbalances as it can be very damaging for your ears.
- **Never stick anything inside your ear canal –** It's important to choose a safe noise protection device that doesn't go too far into your ear canal. Similarly, you don't want to be sticking anything in your ears to remove earwax, such as cotton swabs and other stick-like devices.

example

WHAT IS A PLAYBOOK?

A playbook contains the high level programs, workflows, standard operating procedures and cultural values that an organization executes in its operations. It contains references to roles and responsibilities and tools to accomplish the activities described.

Playbooks will always have a global perspective and often have region specific versions.

example

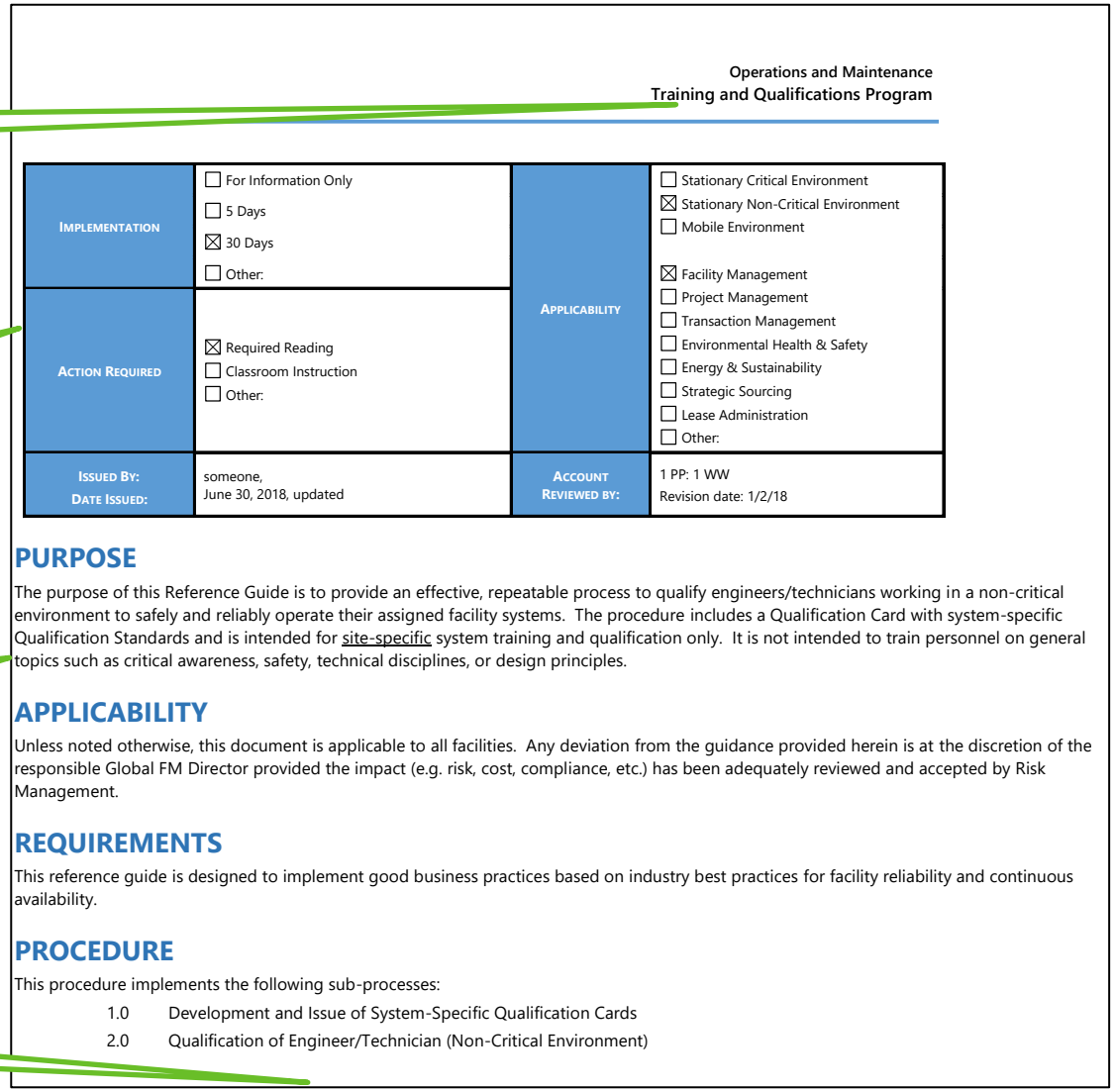
PLAYBOOK EXAMPLE

Title

Application and version information

Overview information on the specific playbook: Purpose, Applicability, Requirements, Procedure

Publication date in footer



Operations and Maintenance
Training and Qualifications Program

IMPLEMENTATION	☐ For Information Only ☐ 5 Days ☒ 30 Days ☐ Other:	APPLICABILITY	☐ Stationary Critical Environment ☒ Stationary Non-Critical Environment ☐ Mobile Environment ☒ Facility Management ☐ Project Management ☐ Transaction Management ☐ Environmental Health & Safety ☐ Energy & Sustainability ☐ Strategic Sourcing ☐ Lease Administration ☐ Other:
ACTION REQUIRED	☒ Required Reading ☐ Classroom Instruction ☐ Other:		
ISSUED BY: DATE ISSUED:	someone, June 30, 2018, updated	ACCOUNT REVIEWED BY:	1 PP: 1 WW Revision date: 1/2/18

PURPOSE

The purpose of this Reference Guide is to provide an effective, repeatable process to qualify engineers/technicians working in a non-critical environment to safely and reliably operate their assigned facility systems. The procedure includes a Qualification Card with system-specific Qualification Standards and is intended for site-specific system training and qualification only. It is not intended to train personnel on general topics such as critical awareness, safety, technical disciplines, or design principles.

APPLICABILITY

Unless noted otherwise, this document is applicable to all facilities. Any deviation from the guidance provided herein is at the discretion of the responsible Global FM Director provided the impact (e.g. risk, cost, compliance, etc.) has been adequately reviewed and accepted by Risk Management.

REQUIREMENTS

This reference guide is designed to implement good business practices based on industry best practices for facility reliability and continuous availability.

PROCEDURE

This procedure implements the following sub-processes:

1.0 Development and Issue of System-Specific Qualification Cards
2.0 Qualification of Engineer/Technician (Non-Critical Environment)

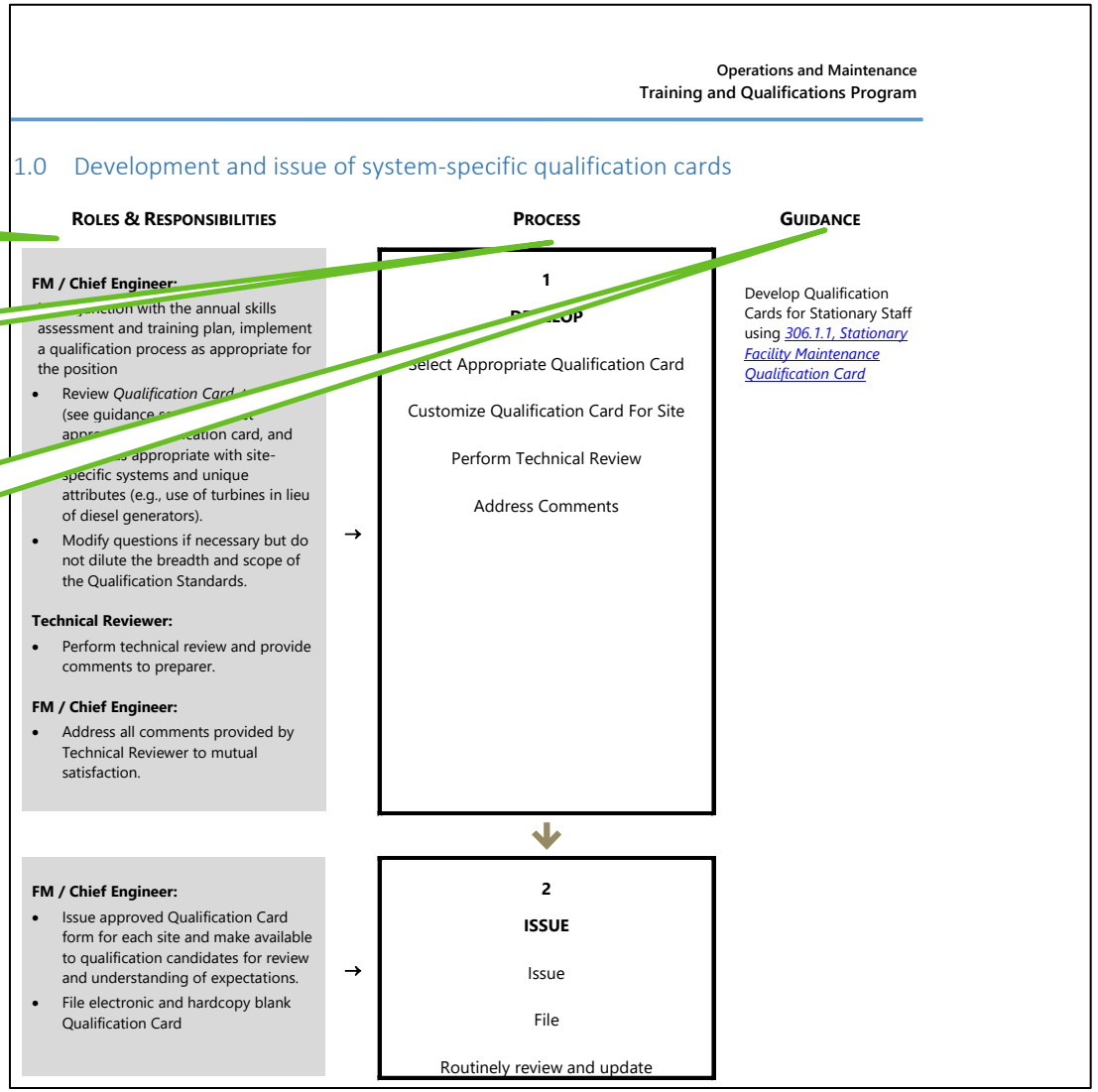
example

PLAYBOOK EXAMPLE

Roles and responsibilities – who is doing what

Process – steps toward goal

Guidance – tools and references



Operations and Maintenance
Training and Qualifications Program

1.0 Development and issue of system-specific qualification cards

ROLES & RESPONSIBILITIES	PROCESS	GUIDANCE
FM / Chief Engineer: …with the annual skills assessment and training plan, implement a qualification process as appropriate for the position • Review *Qualification Card* … (see guidance … …cation card, and • …appropriate with site-specific systems and unique attributes (e.g., use of turbines in lieu of diesel generators). • Modify questions if necessary but do not dilute the breadth and scope of the Qualification Standards. **Technical Reviewer:** • Perform technical review and provide comments to preparer. **FM / Chief Engineer:** • Address all comments provided by Technical Reviewer to mutual satisfaction.	→ **1** **…LOP** Select Appropriate Qualification Card Customize Qualification Card For Site Perform Technical Review Address Comments	Develop Qualification Cards for Stationary Staff using *306.1.1, Stationary Facility Maintenance Qualification Card*
FM / Chief Engineer: • Issue approved Qualification Card form for each site and make available to qualification candidates for review and understanding of expectations. • File electronic and hardcopy blank Qualification Card	→ **2** **ISSUE** Issue File Routinely review and update	

example

PLAYBOOK FRAMEWORK

Maintenance Operations

FM Operations

FM Special Services

Governance

Communications and Reporting

Technology

example

MAINTENANCE OPERATIONS

Work Orders — Origin, management, dispatch, and verification of proactive and reactive work orders

Small Projects — Performing small projects that are not significant enough to be capital projects:

Scoping, contracting and supervision

example

FM OPERATIONS

Department staffing — Onboarding and training of department employees

Vendor management — Onboarding, contracting and supervision of vendors

Compliance — Inspections and attestations; completion and filing of permitting and other documentation requirements in response to local laws and ordinances

Budgeting and cost management — Annual budget; Authorization, treatment and tracking of out-of-budget costs such as project and large repair costs; budget reviews (Also referenced in tracking of cost savings in Initiatives)

example

FM OPERATIONS

Initiatives — Savings and process improvement proposals, documentation and management

Performance measurement — What aspects of service are measured and how. WO on-time percentage and proactive/reactive ratio. Budget accuracy, savings and staffing measures.

example

FM SPECIAL SERVICES

Events Management — Large meetings and events planning

Transportation — Company sponsored employee movement

Call Center— Service areas and languages; contact channels; quality measurements like technician feedback and call length

Non-project MAC — Employee workspace moves that are not large enough to be projects

example

GOVERNANCE

Incident reporting — Reporting of an event that causes a change from normal operation or productivity of people and equipment

Injury reporting — Documentation of a loss time injury or “near miss” to any department employee or vendor. Also when a department employee or vendor is involved in an accident but some one else is hurt.

KPI — Performance measurements that are the top level indicators of success. Calculated and reported at intervals to manage improvement.

OAR — Approval for changes to the FM service vendor contract, usually with a cost impact. The changes can be one time or recurring.

example

GOVERNANCE

Surveys

- Key leadership
- Customer
- Site condition

Centralized data — Organize and make all data available in a secure location (also see Technology)

example

COMMUNICATIONS AND REPORTING

Emergency communications — Who is notified, on what channels, for what priorities; notification tools

Reports

- Real-time incident and injury reporting as well as monthly reviews
- Weekly on-time and proactive/reactive WOs ratio
- Monthly staffing and budget position
- Quarterly KPI review

Meetings

- Global FM
- Regional Operations Review
- Global Department Review
- QBR

example

TECHNOLOGY

Playbook(s) which describes the systems and administration (including data security) of the following technology:

- IWMS — System for dispatch and closure of WOs; PM calendar; equipment inventory; asset management
- Building controls — Systems control; remote lab monitoring; energy reporting
- Other tools — DocuSign; Tableau

example

PRIORITY PLAYBOOKS

1) Emergency Communications
2) Vendor Management
3) Department Staffing
4) Work Orders
5) Compliance
6) Performance Measurement
7) Initiatives
8) Budgeting and Cost Management
9) Injury Reporting
10) Incident Reporting

example

PLAYBOOK PRODUCTION SCHEDULE

Produce 2 playbooks per month

Quarterly review of library and priorities

example

Gracias. Thank You. 謝謝. Salamat. Obrigado. شكرا

Спасибо. 감사합니다. ขอบคุณ. Danke. ありがとう. Merci.

example