



## **2017 Management Conference**

**Hosted by**



**Arizona Public Service**

**February 20<sup>th</sup> – 22<sup>th</sup>**

***Conference Theme***

**Managing Regulatory Compliance  
(Safety, Environmental, System Reliability)  
and  
Asset Operational & Maintenance Risks**

### **Special Activities**

**Welcome Reception – Sponsored by MUWG  
Monday, February. 20<sup>th</sup> - 5:30 PM to 8:30 PM  
Location:  
Cocktails and “Lite Bites” provided**

## Day 1 – Tuesday, February 21st

Time	Track	EVENT/PRESENTATION	Presenter	Location
7:00 AM 8:00 AM	All Attendees	<b>Final Registration/Continental Breakfast Sponsored by MUWG</b>		
8:00 AM 8:20 AM	General	<p style="text-align: center;"><b>Opening Remarks/Introduction/Opportunities, Conference Objectives,</b></p> <ul style="list-style-type: none"> <li>• <b>Introductions</b></li> <li>• <b>Agenda updates</b></li> </ul>	Steve Reasor TVA Bill Olsen MUWG	
8:20 AM 8:45 AM	General	<p style="text-align: center;"><u>Keynote Presentation</u></p> <p style="text-align: center;"><b><u>Corporate Challenges and Obligations for managing safety and a growing list of Regulatory requirements that depend on people and data for success</u></b></p>	Presenter APS	
8:45 AM 9:30 AM	General	<p style="text-align: center;"><u>Management Conference Kick-Off Session</u></p> <p style="text-align: center;"><b><u>This session offers attendees the opportunity to meet and network, followed by a brief introduction of the sessions offered at this conference including a discussion with members sharing their compliance and asset/operational risk challenges and what they expect to gain from attending the conferencehow.</u></b></p>	Facilitated by Clay Cook MUWG	
9:30 AM 10:15 AM	General	<p style="text-align: center;"><u>Presentation</u></p> <p style="text-align: center;"><b><u>Dynergy Alignment of PM Programs with Their Asset Maintenance Management Strategy</u></b></p> <p><b><u>Purpose:</u></b> An explanation of the Preventive Maintenance programs importance in the Asset strategy.</p> <p><b><u>Content:</u></b> Applying defined priorities and identifiers of critical Assets and critical work, and Measuring and Reporting performance (leading and lagging)</p>	Shane Turner Dynergy	
10:15 AM 10:45 AM		<p><b>Morning Break</b></p> <p>An opportunity to network with your peers and share knowledge/experience</p>		<b>Foyer</b>
10:45 AM 12:00 PM	General	<p style="text-align: center;"><b>An Overview of Health, Safety &amp; Environment (HSE) Application by IBM Maximo</b></p> <p>IBM® Maximo® Health, Safety and Environment (HSE) Manager is an organization-wide platform that integrates health, safety and environment processes with work and asset management. This enterprise asset management add on solution provides a central application for reporting all incidents spanning work, personnel, safety, health and environmental areas.</p>	Kyle Harding Stan Smith IBM	Room

## DAY 1 – Tuesday, February 21 (Afternoon Sessions)

12:00 PM 1:00 PM	All attendees	<b>Networking Lunch Sponsored by MUWG</b> <b>A plated lunch to promote discussion by interest group: Power Gen, T&amp;D, Supply Chain, Water &amp; Waste Water</b>		Salon
1:00 PM 2:15 PM	Generation	<p style="text-align: center;"><b>Session 1</b> <b>Dynergy's Approach for setting Asset Priority</b></p> <p><b>Purpose:</b> This is an open discussion on how Dynergy has set up a process for assigning asset priority based on a number of factors</p> <p><b>Content:</b> Asset priority is important for allocating resources and minimizing O&amp;M Risk. The method and justification that Dynergy uses will be shared in an open discussion and Q&amp;A format</p>	Dynergy	Room
1:00 PM 2:15 PM	General	<p style="text-align: center;"><b>Session 2</b> <b>How the data in Maximo Supports Regulatory Compliance</b></p> <p><b>Purpose:</b> Presentation on the functional aspects of Maximo that enable Management and Supervision to apply information on how Maximo should be/could be set up to ensure the database reflects compliance requirements and documents actual data to meet requirements.</p> <p><b>Content:</b> This is primarily a training session on how Maximo functions to meet the needs of management and supervision for Safety and other regulatory requirements associated with the operations and maintenance of assets.</p>	Bill Olsen MUWG Program Manager	Room
1:00 PM 2:15 PM	T&D/ Generation	<p style="text-align: center;"><b>Session 3</b> <b>Using Maximo to provide evidence of PRC-005-6 Compliance</b></p> <p><b>Purpose:</b> To discuss how Maximo can assist utilities to meet the requirements of and maintain compliance with NERC Reliability Standard PRC-005-6 – Protection System, Automatic Reclosing, and Sudden Pressure Relaying Maintenance.</p> <p><b>Content:</b> This is a session designed to give Management insight on how Maximo can be configured and used as a secure asset database for managing the assets within a Protective System Maintenance Program, how Maximo can be used as a secure Protection System maintenance documentation database for managing the documentation of testing, how Maximo can be used to report and/or provide a dashboard showing components approaching maximum interval or maintenance history and provide evidence of a well-documented process of issuing Protection System maintenance work orders, which includes asset failures, corrective action plans, and asset verification.</p>	Clay Cook MUWG	Room
2:15 PM 2:45 PM		<b>Networking Afternoon Break</b> An opportunity to network with your peers, share ideas and move to other breakout sessions		
2:45 PM 4:00 PM	Engineering/ Maintenance Management	<p style="text-align: center;"><b>Session 4</b> <b>Management's Role in Having a Sustainable Maximo User Training Program</b></p> <p><b>Purpose:</b> NYPA recently upgraded Maximo and with the upgrade project, Management realized the importance of training and setting up all the other things such as a Maximo Training environment/training materials, trainers, etc. that are necessary to have a sustainable Maximo training program.</p> <p><b>Content:</b> Presentation and discussion on the importance of creating a sustainable training program to have a successful Maximo/Asset Management implementation.</p>	George Perry NYPA	Room
2:45 PM 4:00 PM	T&D/ Generation	<p style="text-align: center;"><b>Session 5</b> <b>How ENMAX Management Benefits From Using Maximo HSE</b></p> <p><b>Purpose:</b> Discuss and show how management benefits from using the Maximo Health, Safety &amp; Environment (HSE) application at ENMAX.</p> <p><b>Content:</b> Provide an overview on how ENMAX is using the HSE application in their generation facilities and the benefits that it provides to management.</p>	Lindsay Dempsey ENMAX	Room
2:45 PM 4:00 PM	Managing Personnel Safety	<p style="text-align: center;"><b>Session 6</b> <b>Addressing the requirements of 29 CFR 1910 (Safety Rules)</b></p> <p><b>Purpose:</b> This is a training session on the Code of Federal Regulation that apply to the Power Generation industry and is applicable to other similar industries. The focus of this session is to clearly identify the major components of the regulation and how to mitigate risk by integrating the requirements into the work process and Maximo that provides documented evidence for meeting the intent of the Code and the internal safety programs and procedures.</p>	Bill Olsen MUWG Program Manager	Room

## Day 2 – Wednesday, February 22, 2017 (Morning)

Time	Track	EVENT/PRESENTATION	Presenter	Location
7:00 AM 8:00 AM	All Attendees	<b>Continental Breakfast Sponsored by MUWG</b>		
8:00 AM 8:15 AM	General	<u>Conference Business Information</u> <u>Program Manager</u> <u>Management Committee Representative</u>	Bill Olsen MUWG Program Manager  Steve Reasor TVA	
8:15 AM 9:15 AM	General	<u>Presentation</u>  <b>Risk Management at TVA</b> Risk Management - a process of Optimized Modeling that balances asset requirements, facts, operational characteristics and future operational predictions, each having a value based formula to produce a statistical influence. How TVA constrains multiple risks to balance and right-size investment opportunities using component elements - asset health, availability factors, risk averse elements, asset constraints, asset factors, failure curves and risk multipliers as formulations to create an optimized portfolio.	TVA Michell Ray	
9:15 AM 10:15 AM	General	<u>Presentation</u>  <b>ADDRESSING THE CULTURAL ASPECTS OF RISK MANAGEMENT.</b> A presentation on how your database reflects what is important to Management and to the success of you business. A clear and auditable relationship exist between the Maximo database and data that provide management with a clear picture of risk importance to the work culture and practices that enable improvement. This data allows management to track cultural changes and improvements to business practices	Bill Olsen MUWG Program Manager  Steve Reasor TVA	
10:15 AM 10:45 AM		<b>Morning Break</b>  An opportunity to network with your peers and share knowledge/experience		<b>Foyer</b>

<b>DAY 2 – Wednesday, February 22, 2017 (Morning Sessions)</b>				
10:45 AM 12:00 PM	General	<u>Session 7</u> <b>What Management should know about the Asset Database and Risk Measurement</b> <b>Purpose:</b> Discuss how the Maximo asset database should be configured to support an effective risk management program and what Management should know about the Maximo asset database.. <b>Content:</b> This is a training session designed to give Management insight on how Maximo can be configured and used to support an effective risk management program including the importance of having documented procedures to standardize what assets are tracked and the importance of assigning criticality to assets and locations,	Clay Cook MUWG	Room
10:45 AM 12:00 PM	General	<u>Session 8</u> <b>Performing an Internal Assessment of the value of the Maximo Database</b> <b>Purpose:</b> Discuss how management can evaluate the configuration of the Maximo database to meet you business and information requirements. <b>Content:</b> To meet the information requirements that reflect performance of assets and staff the database (Maximo) configuration must be logical and aligned with the business information requirements. We will discuss the process of determining if your Maximo configuration is capable of supporting managements' data requirements consistant with expectations good business practices.	Bill Olsen MUWG	Room
10:45 AM 12:00 PM	General	<u>Session 9</u> <b>Using Maximo for NERC Compliance</b> <b>Purpose:</b> This is a training session and exchange of ideas on how to use Maximo to meet regulatory compliance reporting requirements. <b>Content:</b> How one company is using condition monitoring, dashboards and escalations to meet their obligations.	Rick Ulrich MUWG	Room

12:00 PM 1:00 PM	All attendees	<b>Networking Lunch Sponsored by MUWG</b> A plated lunch to promote discussion by interest group: Power Gen, T&D, Supply Chain, Water & Waste Water, IT, Fleet and Management		Room
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<b><u>DAY 2 – Wednesday, February 22, 2017 (Afternoon Sessions)</u></b>					
1:00 PM 2:30 PM	General	<p style="text-align: center;"><b>Session 10</b> <b>Engineering’s Role in Managing Asset Availability/Reliability and Risk</b></p> <p><b>Purpose:</b> Presentation on how asset data is applied across a full spectre of engineering analysis to improve the overall operation, maintenance and care of critical and important assets.</p> <p><b>Content:</b> When Maximo is configured for asset life cycle management a major benefit is derived from how the data from the design, operation and maintenance can be used to support availability and reliability in terms of how the assets are serviced to meet design and O&amp;M commitments. Asset history and performance data plays a key role in creating programs and processes to ensure assets meet design requirements in terms of avialibility and cost. This is primarily a training session on Maximo functionality related to the role of engineering, operations and maintenance management and the asset data/information.</p>		BillOlsen MUWG Program Manager	Room
1:00 PM 2:30 PM	Asset Management	<p style="text-align: center;"><b>Session 11</b> <b>Maximo Condition Monitoring for Predictive Maintenance to Improve Reliability</b></p> <p><b>Purpose:</b> This is a training session and exchange of ideas on how to use Maximo Condition Monitoring in conjunction with your utilities predictive maintenance program to improve reliability.</p> <p><b>Content:</b> Discuss the use of Maximo along with other predictive maintenance technologies to improve reliability.</p>		Rick Ulrich Clay Cook MUWG	Room
1:00 PM 2:30 PM	T&D/ Generation	<p style="text-align: center;"><b>Session 12</b> <b>Overview of WAPA’s Approach for Managing Asset HI and Risk Using Maximo.</b></p> <p><b>Content:</b> Present an overview of WAPA’s process for managing critical assets in Maximo. Discuss the data collection workflow for Maximo and GIS and the design improvements to the asset module for managing the Health Index and the scores for POF, Consequence and Risk. Also discuss how assets that exceed thresholds are escalated for action through the use of the Service Request module.</p>		Bill Baily WAPA	Room
2:30 PM 3:00 PM	General	<b><u>OPEN DISCUSSION - SUMMARY</u></b> <b><u>CLOSING REMARKS</u></b>		Ballroom	

## **3:00PM TO 5:30 PM - POST CONFERENCE TRAINING AND DISCUSSION WITH MAXIMO LIVE**

### **Maximo Management/Supervisor Training**

### **“Understanding Location and Asset Functionality With Maximo Live Demonstation”**

Provided at no additional cost by Bill Olsen and Clay Cook – this is a good opportunity for open discussion and to improve your knowledge of Maximo.