

**PEMAC**

**Strategic Plan**  
2015 – 2020

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## Introduction

Tasked with developing a new strategic plan at a critical juncture in the development of the asset management profession worldwide, the PEMAC Board of Directors joined forces with the Global Forum for Maintenance and Asset Management in 2011 to build relationships with leading maintenance and asset-management organizations. Since 2011 our Executive Director and a number of association leaders attended conferences of like-minded organizations in the US, United Kingdom, Brazil, Australia and Finland. In 2013 we hosted the leaders from these peak bodies (and others including South Africa, the Gulf Region and Japan) at MainTrain in Calgary, AB. The driving questions have been: Where does PEMAC fit globally with respect to maintenance and asset management? What can we learn? In what ways do we want to grow? How do we want to contribute? How will we allocate our resources?

We can now say with confidence that PEMAC and its members are in a position to contribute actively and confidently to the further-development of global understanding in asset management. It's clearly time to step forward into the arena of global leadership articulated in the PEMAC vision statement some 20 years ago. We are conscious, however, of the need to remain focused on our core strengths – professional development that builds capacity of individuals and organizations.

After assessing the external environment it was time to look within. In early 2014 we engaged a member volunteer to facilitate an iterative Delphi risk process to draw as many insights as possible from our leadership team (past and present). The process was anonymous so that participants could freely share their thoughts. The facilitator categorized our insights into risks and opportunities. Further iterations and refinement of the base data ensued. This document, an outward facing strategic plan, is the first outcome of this rigorous process.

## Overview

The Strategic Plan begins with the long-standing **Vision and Mission** of PEMAC.

The next section - the **Vivid Description** – is what our desired position will look like in 5 years. The statements articulate what the association hopes to achieve and how it will look and feel to be a part of the vision.

A new diagram, the **PEMAC Business Model** has undergone several iterations. It shows in one glance our core service offerings, the inputs that make them possible, the outputs, key measures of success and the supporting structures that keep it relevant and viable.

The core of the plan is a set of **Goals and Objectives** identified through the strategic planning process. In the **Appendix** we have included a table that lists the key staff and volunteer roles that are tagged to the action items (not included) identified to achieve all of the outlined goals. Many of these staff and volunteer positions are vacant. And of course those that have been filled will turn over from time to time. We know that there are many among our members who are anxious to help

This plan provides the framework to help you take initiative with the confidence that your contributions will fit. There can be no doubt that serving as a contributing member is the best way to connect and learn. The stimulating challenges of the work itself will provide a whole new set of opportunities for professional development for our members as we grow and learn together.

## The Foundation

### **PEMAC Vision**

*PEMAC is a national not for profit association providing global leadership, education and certification in maintenance, reliability & asset management.*

### **PEMAC Mission**

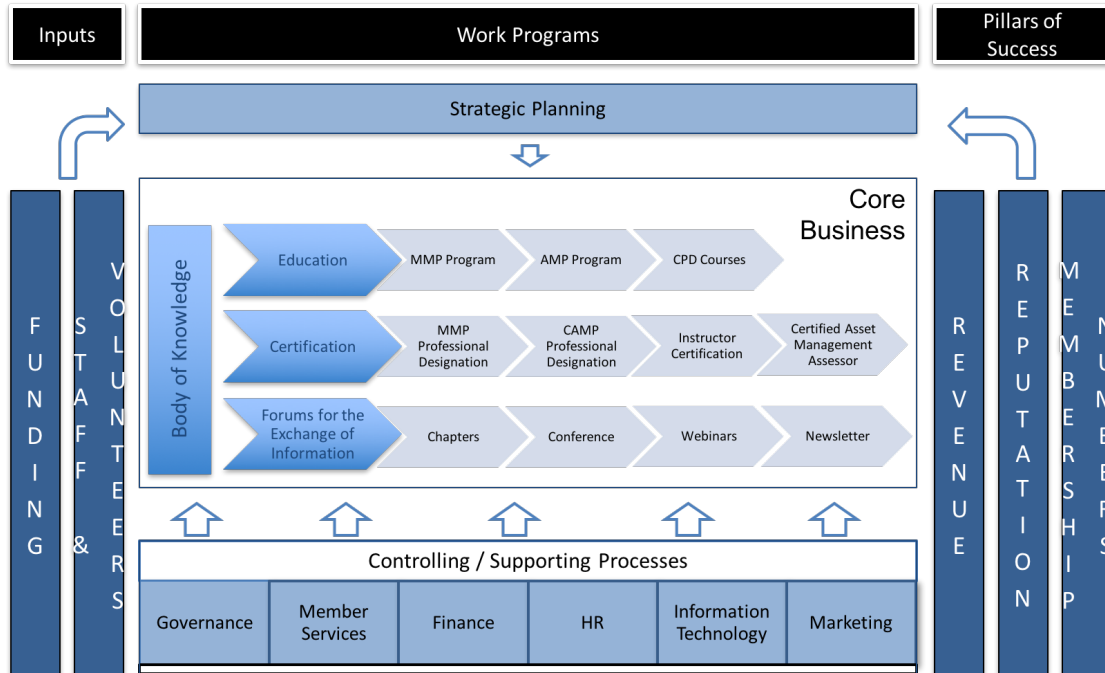
*PEMAC's mission is to improve its member's professionalism, safety, performance, and outside recognition and to act as a public voice for its members and the profession.*

## The Vivid Description

The following statements are intended to be a description of what our desired position will look like in 5 years. The statements articulate what the association hopes to achieve and how it will look and feel to be a part of the vision.

1. PEMAC has a well-developed Body of Knowledge for asset management linked to our foundation in maintenance and reliability. Our professional members span front line trades through to senior executives and have a common language that transcends silos within our multi-sectored industries' organizational structures.
2. Organizations value PEMAC's Body of Knowledge and encourage professional development of their employees through participation in its training and certification.
3. PEMAC has an excellent system for engaging stakeholders in the process of creating, challenging, reviewing, validating, and updating the PEMAC Body of Knowledge.
4. PEMAC contributes in an ongoing way to the global Body of Knowledge in asset management.
5. PEMAC has actively engaged members, measured by the number of people participating in conferences, courses, webinars, chapter meetings and voting at the AGM.
6. The framework for the PEMAC Body of Knowledge is publicly available on the website and elaborated upon by published articles, PEMAC courseware, annual conferences, chapter events, the members-only section of the website and discussion groups.
7. PEMAC provides opportunities for members to connect, learn and contribute wherever they might live and work and whatever role they play in the application of maintenance, reliability and asset-management practices.
8. PEMAC is internationally recognized for facilitating professional development in maintenance, reliability and asset management for individuals who serve varied roles in their organizations.
9. PEMAC's certification system is globally recognized and aligned.
10. PEMAC has over 3000 diverse members from a broad range of industry sectors.

# PEMAC Business Model



## Strategic Plan - Goals by Objective

### Goal 1: Excel at Engagement

#### Objectives

- Develop a framework for action that engages and enables contribution from staff and volunteers while aligning their work.
- Increase engagement in professional development.
- Maintain a strong, strategically focused Board of Directors.

### Goal 2: Deliver Value

#### Objectives

- Continue to develop the Body of Knowledge and provide access in numerous ways.
- Increase networking and professional development events.

### Goal 3: Sustain Credibility

#### Objectives

- Stay abreast of and contribute to global developments in the field.
- Regularly review curriculum against changes in theory and practice.
  - Seek input
- Formally certify instructors.
- Provide support for meaningful use of ISO 5500x.

## ***Goal 4: Grow Awareness***

### **Objectives**

- Promote our Body of Knowledge, Education and Certifications.
- Communicate accomplishments of PEMAC and its members.
- Further develop a network of member advocates.
- Clearly articulate the value of PEMAC

## ***Goal 5: Thrive***

### **Objectives**

- Apply good governance
  - Comply with Canada's not-for-profit Corporations Act.
  - Ensure good financial management.
  - Establish due diligence with respect to compliance with copyright laws.
  - Establish an Asset Management system.
  - Establish human resources policies and procedures.
  - Establish a succession-planning system for both compensated and volunteer roles.

## **Acknowledgements**

We would like to thank Ron Gavrin, the volunteer facilitator who conducted the Delphi process and spent many hours-synthesizing the thoughts of the participants to enable us to articulate this vision for the next five years.

## Appendix – Framework for Action

**Action items are attached to each of these roles:**

<b>Compensated:</b>	<b>Volunteer &amp; Associates</b>
Executive Director	President Vice President Treasurer Directors Governance Lead Human Resources Lead
Ed & PD Program Manager	BoK Lead Education Team MMP Program Lead AMP Program Lead Course Owner(s) Certification Lead Certification Committee
Education Program Admin	Authorized Instructors Certified Professionals Teaching Institution Contacts
Marketing and Events Coordinator	Marketing Lead Conference – Chair Conference – Committee Members CPD Opportunities Lead Chapter Development Lead
Head Office Administration Printing/Shipping/Receiving	

### ***Getting Involved***

There is a further level of detail available and not published here. Using this underlying level of detail we will be able to provide staff and volunteers with a starter list of action items pre-approved by the Board of Directors and a clear understanding of how each action contributes to the achievement of strategic plan.

If you are interested in serving in any of these roles feel free to contact the Executive Director at [executive.director@pemac.org](mailto:executive.director@pemac.org).