WHAT'S THE DIFFERENCE BETWEEN CAPITAL AND MAINTENANCE PLANNING DATA?

RothNotes series

In recent conversations with clients, a common theme has emerged: confusion over the difference between datasets used for capital planning versus maintenance planning. Here are some key points that may clarify the distinctions.

Maintenance or Equipment-Level Dataset

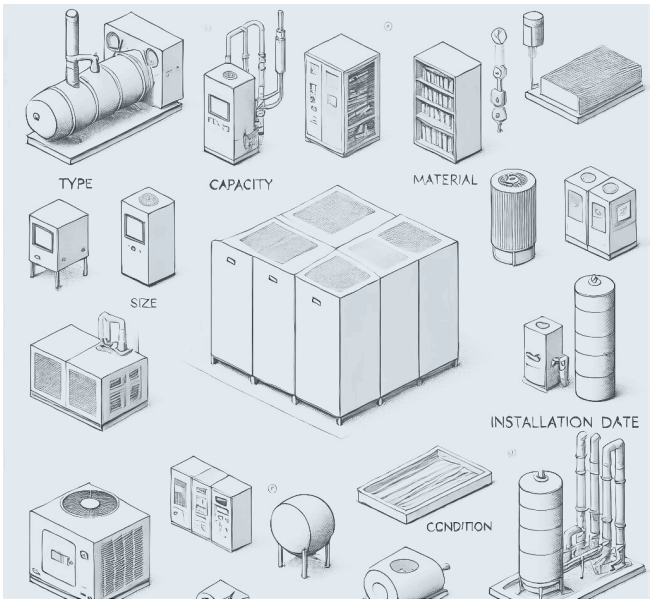
This is the more granular of the two datasets. Ideally, you would have an inventory of each type of equipment that requires preventative maintenance and tracks reactive maintenance. However, an equipment-level dataset isn't collected for all building elements.

Typically, it focuses on major mechanical and electrical equipment and some architectural elements.

Capital Planning Dataset

This dataset is typically less granular, often referred to as element or component level.

Here, individual pieces of equipment and related types of equipment are grouped into elements. This grouping is based on similar type, size, capacity, material, installation date, and condition.



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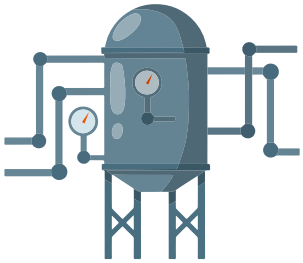
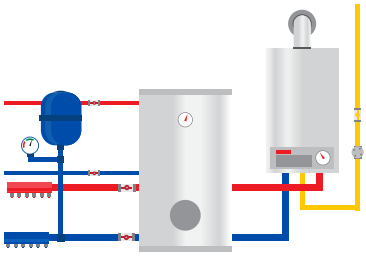
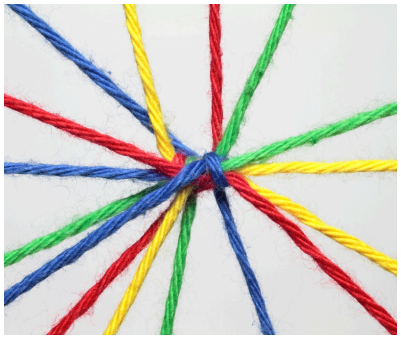
With this level of detail, maintenance can be tracked back to an individual piece of equipment, a powerful feature of a Computerized Maintenance Management System (CMMS). Knowing the specific preventative and reactive maintenance performed on a piece of equipment provides valuable insights into its performance and functionality.

For instance, three boilers in a building that are the same type, capacity, age, and condition might be represented as a single element: "Boilers, Quantity 3." If one boiler is new and two are old, they would be represented as two elements.





Unfortunately, most CMMS systems do not track data at this granular level. Often, maintenance is tracked to the building or asset level, or at best, to an element level (e.g., boilers). This lack of detailed tracking diminishes the potential to leverage maintenance data for comprehensive asset management.



The capital planning dataset often shows a many-to-one relationship (e.g., three individual boilers in the equipment dataset but one element in the capital planning dataset). Additionally, there are element-level data for items not covered by the equipment-level dataset, making the capital planning dataset more comprehensive.

Key Takeaway

The core difference between these datasets can be summarized as follows: an Equipment Inventory is more detailed but limited in scope (covering only some building elements), whereas an Element-Level dataset is less detailed but more comprehensive in scope (covering all building elements).

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