S5 Parts Room Design Standardization Task Force

Agenda:
- Task Force Leadership Update
- Overview from Spring 2023 TMC Meeting
- RP Pathway

Task Force Leadership Update
- Chair: Wayne Skinner, Ozark Motor Lines, Inc.
- Co-Chair: Tom Chisholm, US Xpress
- Secretary: S5 Bailey Stephenson, Alcoa Wheels
  - Requesting a task force secretary from within the group.
  - Requirements are listed in the TMC Ops Manual and in the Appendix.

Overview from Spring 2023 TMC Meeting
1. Why is this RP needed?
2. Motion to create a standalone RP on parts room standardization & revise RP531/RP530 if needed.
3. Slide deck is posted on the Task Force page.
4. Meeting minutes posted in The Trailblazer February / March 2023 - pgs 49-50

Parts Room Design Standardization – The RP Pathway Forward

Scope
- Fleets (not retail or service providers since they will have different goals for inventory, etc.)

Purpose
- To provide guidance to fleets and to assist in consistency within each fleet's shop locations.

Content categories
1. <u>Inventory Best Practices</u>
   a. Define bin locations by row, column, and shelf.
   b. Organize inventoried parts in VMRS & numerical part order.
   c. Parts room cleanliness and lighting
   d. Determine appropriate cycle count interval
   e. Use of Min/Max
   f. What about unused / unusable inventory
   g. Strategies around having a closed vs open parts room
   h. Warranty parts handling
   i. Goal setting for inventory variance.
   j. Glossary of terms

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Content categories (cont'd)

2. <u>Additional categories gleaned from the Spring 23 meeting minutes</u>
   a. Consumable parts
   b. When to charge out the parts – before giving to Tech?
   c. Dormant parts process?
   d. Returning of dormant parts?
   e.
3. Any additional categories?

RP Research
1. Volunteer needed to determine what content already exists in RP531.
2. Prioritize new content for RP / update RP531 content.

Content Development
1. Need volunteers to write content on each category
2. Leadership will write as well, but better for content to come from Task Force Membership List green sheet list.
3. Assign content developers.

Call Timing
- Plan on bi-monthly TF check-in Zoom meetings before Cleveland / review of content.
  a. May
  b. July
  c. August

Fall 2023 meeting report out (September)
1. Task Force and leadership update (Tom & Secretary)
2. Determine what categories should be part of RP531 and what categories should exist in stand-alone new RP for Parts Room set up.
3. Review of content

Wrap Up
- Appendix reminder.
- Agenda will be posted on TMC Connect.
- Meeting minutes will be posted on TMC Connect.
- Q&A.

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Appendix

The Trailerblazer Minutes

Parts Room Design Standardization —Chairman

Wayne Skinner, Ozark Motor Lines, Inc; Secretary

Bailey Stephenson, Alcoa Wheels. Attendance: 103;

80 Full, 18 Associate, 5 Other.

Attendees were made aware of the ATA antitrust and patent disclosure guidelines. Chairman Skinner said there is a need for parts room design standards for fleets and terminals. He said he saw the same need within his organization and was able to put in some best practices that he wanted to make into a TMC recommended practice (RP).

Unfortunately, after review, he did not see too much information to make this into its own RP so his goal for this meeting was to leave it up to the Task Force itself to decide which of two ways it should proceed:

1. Revise the two existing TMC RPs that address parts room standards, which are RP 530, Fleet Guidelines For Parts Purchasing, and RP 531, Parts Inventory Management Guidelines.
2. Create a new RP on parts room design best practices.

The Task Force would address correct terminology and offer guidelines for consistency, specifically for fleets with multiple terminals and technicians at each terminal. It would go over bin location, shelf vs. bin language, organization by Vehicle Maintenance Reporting Standards (VMRS) or numerical part numbers, counting inventory and loss, appropriate intervals for counting inventory, cleanliness, lighting and much more.

Some questions fleets should ask themselves:

- When did I trade this truck in?
- Are the parts being stored still applicable?
- Who do I let into my parts room?

Chairman Skinner said his operation looks at trade schedules, tracks which parts no longer apply, and recently limited technician travel in and out of the parts room by hiring a clerk and manager to go and acquire the part needed which had no issues with implementation nor have there been complications since, he said.

Some questions followed:

Q: When do you charge for parts? — Sedrick Wiggins, Southeastern Freight Lines

A: Chairman Skinner—We put a terminal inside of the parts department and told parts to charge the

item out before they hand it to the tech.

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Q: Are there any zip ties in the part room?— Tim Boyd, Southeastern Freight Lines

A: Chairman Skinner—Those are outside on the shop floor along with consumables. Everything Tier 1 is inside of the shop.

Q: Do techs have access to the inventory? — Ken Weltch, Samuel Coraluzza Co., Inc.

A: Chairman Skinner—Parts service personnel notify the techs of inventory on hand.

Q: What is your inventory cycle? — Attendee.

A: Chairman Skinner—Every 30 days, we count, but we usually break that count into four cycles, so it is never a big overhaul.

Q: Is there any policy on dormant parts? — Mark, Freight Systems

A: Chairman Skinner—One hundred and eighty days of non-use is a part that we can confidently get rid of and is a common practice.

Q: What is your process with recoup o old parts?—John Brockmiller, Dean Transport.

A: Chairman Skinner—We try to return to the vendor. Since we only have one make of tractor and one make of trailer, we utilize that good relationship. The challenge that we have there is an irrelevant part; it could be an asset out of the system or a scrap part. However, our last count was slim there. The Task Force decided to pursue the development of a new RP on this subject, but also recognizing revisions to RPs 530 and 531 may also be needed.

The meeting was adjourned. The Task Force will meet next in open session during TMC's 2023 Fall

Meeting & National Technician Skills Competitions, scheduled for September 17-21, 2023 at the Huntington Convention Center in Cleveland, Ohio.

Task Force Secretaries

Task Force Secretaries shall coordinate their activities with the Study Group Secretary.

- Task Force Secretaries must provide their Study Group Secretaries and Task Force Chairmen with a synopsis of their Task Force meetings prior to their Study Group Meetings so that the Task Force Chairmen can give the Task Force Reports during their respective Study Group meetings that same week.
- The Task Force report should include the information requested on the task force minutes form. Details on Task Force Secretary responsibilities are contained within TMC's "Guidelines for Task Force and Study Group Secretaries," which is available from TMC staff. All Task Force Secretaries should review this document.
- The Task Force Secretary shall ensure that all forms provided to the Task Force are properly completed and submitted to the Task Force Chairman or to TMC staff.
- A file of all minutes must be maintained for the duration of the Task Force activity. A membership list must be taken at each meeting and be kept as part of the minutes.

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- The Task Force membership list is the list of the active participants of the Task Force. Individuals may only be placed on the list if they make their request in person to the Task Force Chairman or in writing. Typically, the Task Force Chairman will ask all attendees if they wish to be placed on the list.
- Task Force reports are a summary of Task Force minutes and shall be submitted to the Study Group secretary before the corresponding Study Group meeting.
- The Task Force Secretary should be familiar with Article 13 of TMC's Operating Manual, which describes the formal procedure for the development of Recommended Practices.
- The Task Force Secretary should be knowledgeable with the subject of the Task Force so he/she will understand the technical information and terminology that will be addressed.