RELIABILITY
MANAGEMENT

FACILITATION WORKBOOK

STARTER PACK · up to 2 analyses

RCM Facilitation Workbook

A complete field guide and working template for Reliability Centered Maintenance analysis — reference content, an operating context briefing sheet, and ready-to-use RCM worksheet spreads for your team.

Version 4.0

Edition August 2026

For RCM Facilitators & Review Teams

Compiled Document V8

RELIABILITY MANAGEMENT

RCM Quick Guide

Reliability Centered Maintenance

What is RCM - Reliability Centered Maintenance

RCM is a systematic, structured approach that involves identifying appropriate failure management strategies for reasonably likely failure modes (causes of failure). These strategies include On-Condition, Scheduled Overhaul, Scheduled Discard, Run to Failure, Redesign, and Failure Finding. RCM enables reliability to be maximised at minimum cost.

What RCM achieves

Improved reliability

- Improved environmental integrity
- Fewer failures
- Reduced unplanned downtime
- Reduced planned downtime
- Reduced total / life cycle costs
- Higher efficiency
- Better product quality

Through

- Proactive management of assets
- An audit trail for the failure
- Allowing continuous improvment

Resulting in

- Less firefighting
- Better trained staff
- Higher morale and job satisfaction
- Higher profitability
- Less Risk

> **RCM enables reliability to be maximised at minimum cost.**

The Seven Key Questions:

1 - Functions - What do we want the asset to do in its present operating context?

2 - Functional Failures - How can it fail to fulfil its functions?

3 - Failure Modes - What causes the functional failures?

4 - Failure Effect - What happens when each failure mode occurs?

5 - Failure Consequences - In what way does each failure matter?

6 - Proactive Tasks - Can we predict or prevent failure, and should we be doing so?

7 - Default tasks - How should we manage the failure if prediction or prevention is not an option?

Functions

We list functions because, by definition, a failure occurs when an asset does not do what its user wants it to do (i.e., it has lost a function), so identifying functions is fundamental to the identification and management of failures.

Functions are statements of what the users of the asset want it to do.

Virtually every asset has many functions. The primary function is the main reason the asset exists. Secondary Functions are additional requirements that were not the main reason the asset exists. These may relate to any of the following:

- Safety
- Environment/Economy/Efficiency
- Comfort/Control/Containment
- Indication
- Protection
- Appearance

Functions usually start with the word “To” and include an active verb, an object, and a performance standard(s)

Examples of Functions for a Car

1. To transport up to 4 people from A to B at speeds of up to 130 km/hr
2. To limit the discharge of Carbon Dioxide in the exhaust to less than 170g per km
3. To maintain the temperature of the passenger cell between 15ºC and 25°C
4. To contain the fuel within the system
5. To alert the driver if the oil pressure falls to 2.5 barg etc

Operating Context

The operating context refers to the specific conditions under which an asset operates, including its environment, performance requirements, and the consequences of failure. When developing an operating context for an asset, the following information would be included:

1. Description of the equipment, including fleet covered (if applicable) and its history
2. The wider business and process, including whether it is batch or flow, duty/ standby, etc
3. Inputs and outputs to the asset
4. Customers
5. Who operates and maintains the existing maintenance programme in general terms
6. Any operations or maintenance windows
7. Location and implications of this (clean/dirty, wet/dry, hot/cold, etc.)
8. Analysis boundaries
9. The reason for the analysis - objectives and past performance

Identifying Function Systematically

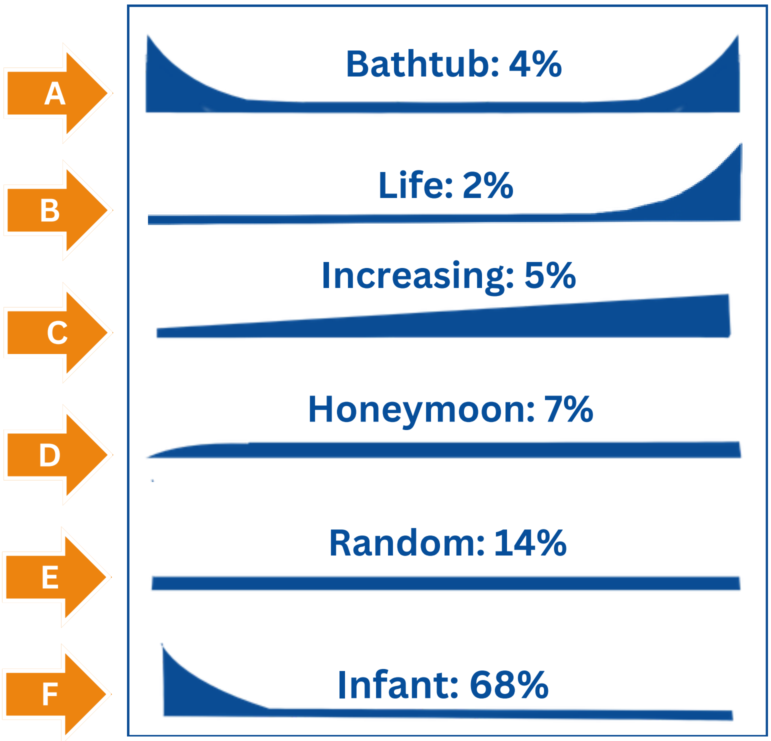
Define Primary Function(s) at a high level

Consider which of the Secondary Function categories apply

Systematically review the system, process, or asset and ask whether each item supports the primary or any listed function.

If it does, you've covered it. If it doesn't, the additional function(s) it fulfils needs to be listed

6 Failure Patterns



A,B,C

Simple equipment in direct contact with the environment

Wear
Fatigue,
Corrosion

D,E,F

Complex equipment or simple equipment with a complex history

Electronics,
Hydraulics,
Pneumatics,
Bearings

Functional Failures

Functional failures are failed states and the negatives of the functions. Sometimes, more than one Functional Failure may be recorded:

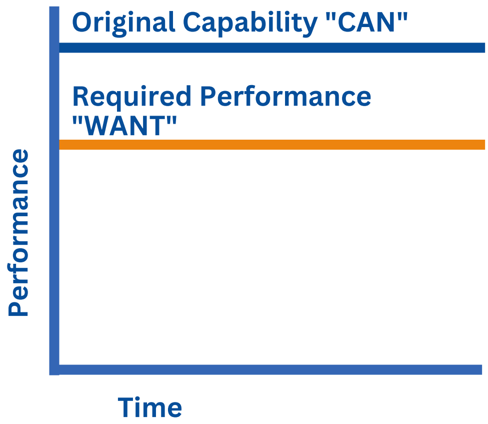
- Total Failure, e.g, Fails to pump at all
- Partial Failure, e.g, Fails to pump more than 300 lpm

If a function has many performance standards, a separate functional failure for each may be appropriate.

Examples of Functional Failures for a Car

- 1A Fails to transport at all
- 1B Fails to transport up to 4 people
- 1C Fails to transport at speeds up to 130 km/hr
- 2A CO_2 discharge in the exhaust exceeds 170g per km
- 3A Fails to maintain the temperature of the passenger cell between 15ºC and 25°C
- 4A Fails to contain the fuel within the system

Can / Want



If the 'can' is below 'want' the equipment is in a state of failure

There are two different standards of performance for any asset

Maintenance cannot increase performance above the original capability

Failure Modes

Failure Modes are the root causes of functional failures. Each functional failure can have many failure modes.

They are the ‘currency in failure management - they are what maintenance, redesigns, etc., manage.

The root cause should be described in enough detail to enable an appropriate failure management task to be identified.

Failures that should be listed include:

- Failures that have already occurred
- Failures that are being prevented by the current maintenance program
- Failures that have not yet happened but are reasonably likely to occur

When listing failure modes

When listing failure modes, we must consider all types. In general terms, these fall into four categories:

- Failures due to deterioration (wear, corrosion, erosion, etc.)
- Failures occur because the demand on the equipment has increased beyond its capability to meet it.
- Failures caused by problems from the beginning, such as design shortcomings, installation errors, commissioning errors, procurement issues, or handling deficiencies
- Failures caused by human error

Failure Mode Sources

External Sources*

OEM, Service Organization, Manuals

Field history - known failures

Knowledge and experience

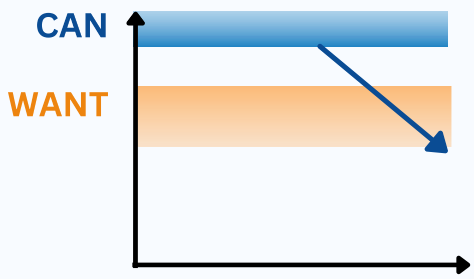
Maintenance and inspection activities

Reports

3. CAUSES (4 CATEGORIES)

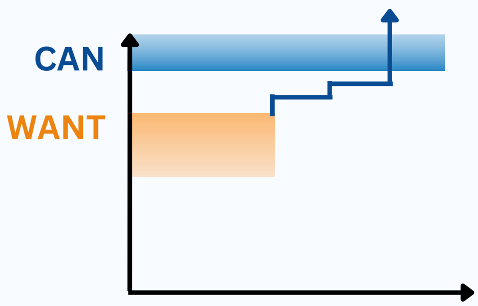
1. Deterioration

- Erosion
- Wear
- Fatigue
- Corrosion
- Dirt Ingress
- Lack of Lubrication
- Disassembly



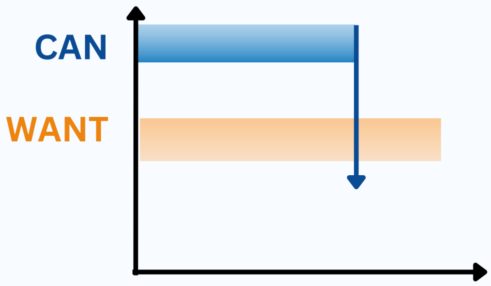
2. Things have changed

- Deliberate overload
- Unintentional overload
- Changes in conditions



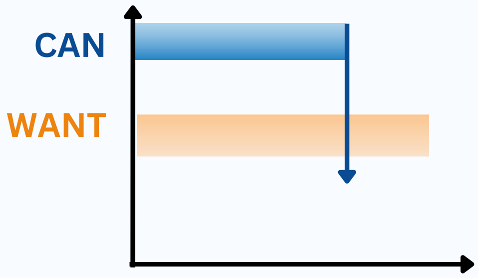
3. WRONG FROM BEGINNING

- Design Error
- Installation error
- Procurement error
- Ergonomic Issues



4. HUMAN FACTORS

- Training or competence inadequate
- Poor operating or maintenance procedures
- Deliberate violations
- Mistakes
- Errors



Failure Modes Example

Failure Modes for functional failure:
“fails to pump at all” for centrifugalal pump

- Power supply fails
- Impeller fails due to normal wear
- Inlet blocked by foreign object
- Pump seal fails
- Motor bearing fails due to normal wear
- Casing corrosion
- Pump Bearing fails due to normal wear
- Coupling sheared
- Pump bearing fitted incorrectly
- Inlet valve left closed after maintenance
- Motor supply cable connection corroded

Failure Effects

For each Failure Mode, we record the Failure Effects. These allow us to evaluate the consequences of failure and justify the resulting failure management task.

These describe what happens when each failure occurs, in the order in which they occur, to their natural conclusions.

They include local effects, next-level effects, and end effects.

They should be described as if no maintenance task is being used to prevent or predict the failure.

They should assume a ‘typical worst case’ scenario.

Where relevant, the following information needs to be described in the failure effects:

- How the failure comes to the operator’s attention
- safety / environmental impacts
- effect on operations/process
- secondary damage (if any)
- downtime to repair

Example Failure Modes and Failure Effects

Failure Mode: Coupling bearing fails due to normal wear

Failure Effect: There are vibration and temperature monitoring devices on the bearings, which would lead to an alarm and trip. If the coupling fails, there is no drive. There will be secondary damage if a failing bearing is allowed to deteriorate to the trip point. Time to repair: 3 days.

Failure Mode: Motor Enclosure seal wears

Failure Effect: The pressure inside the enclosure decreases, leading to a trip on low-purge pressure (no alarm). This decrease can happen quickly. The seals have never been replaced. Seal failure has caused trips in the past, and the seals have been repaired with silicon sealant. Time to replace the seal is 1 day. A leaking seal increases the risk of trips if the regulator is sticky. Note that the seals are presently leaking.

Failure Mode: Lube oil pump wears

Failure Effect: These are screw-type pumps, with a duty-standby arrangement. If the pump wears out, the supply pressure will fall; an alarm will sound at 2.4 bar, and the standby pump will cut in. The DCS will show that both pumps are running. Time to overhaul the pump is 2 days. The duty and standby pumps are switched by operations every month.

Failure Consequences

The RCM Decision Diagram is applied to each Failure Mode to determine an appropriate failure management strategy.

The first step in the Decision Diagram is to evaluate the consequences of the Failure Mode by asking two questions:

1. Will the loss of function or secondary damage caused by the single failure eventually become evident to the organization under normal operating conditions? (If the answer is yes the failure is an evident failure, if it is no, the failufre is hidden)
2. Will the loss-of-function or secondary damage caused by this Failure or Multiple Failure have an intolerable adverse effect on safety or the Environment? (Yes indicates a safety or environmental consequence, no means financial)

The answers to these questions will result in the categorisation of the Failure Mode into one of 4 categories (Hidden Safety, Hidden Financial, Evident Safety, Evident Financial)

The consequence categorisation determines the failure management task options available, and also the criterion for determining if a candidate task is worth doing

Evident Safety	**Evident Financial**
Hidden Safety	**Hidden Financial**

Outline RCM Decision Diagram

Loss of Function Evident?

Evident		Hidden	
Safety / Environment?		Safety / Environment?	
SAFETY / ENV.	FINANCIAL	SAFETY / ENV.	FINANCIAL
ES1 On-Condition	EF1 On-Condition	HS1 On-Condition	HF1 On-Condition
ES2 Scheduled Overhaul	EF2 Scheduled Overhaul	HS2 Scheduled Overhaul	HF2 Scheduled Overhaul
ES3 Scheduled Replacement	EF3 Scheduled Replacement	HS3 Scheduled Replacement	HF3 Scheduled Replacement
ES4 Redesign	EF4 Reactive Maintenance	HS4 Failure Finding	HF4 Failure Finding
ES5 Risk Review	EF5 Redesign	HS5 Redesign	HF5 Reactive Maintenance
		HS6 Risk Review	HF6 Redesign

Outline RCM Decision Diagram

Proactive Tasks and Default Tasks

The RCM Decision Diagram considers all applicable failure management tasks in an appropriate order.

For all consequence categories, proactive, cyclic maintenance tasks are considered ahead of redesign/ one-time change

For each proactive task, two sets of questions are asked: technically feasible (can the task be done?) and worth doing (should it be done?).

For a task to be selected, a positive response is needed for all the small questions for both criteria

The exact questions vary according to the consequence category and task type (the example shown is for an on-condition task for a failure with safety consequences)

For each task selected, the coding system shows the consequence category and task type (e.g., ES1)

Technically Feasible + **Worth Doing?** → **Do the On-Condition Task**

On-Condition?

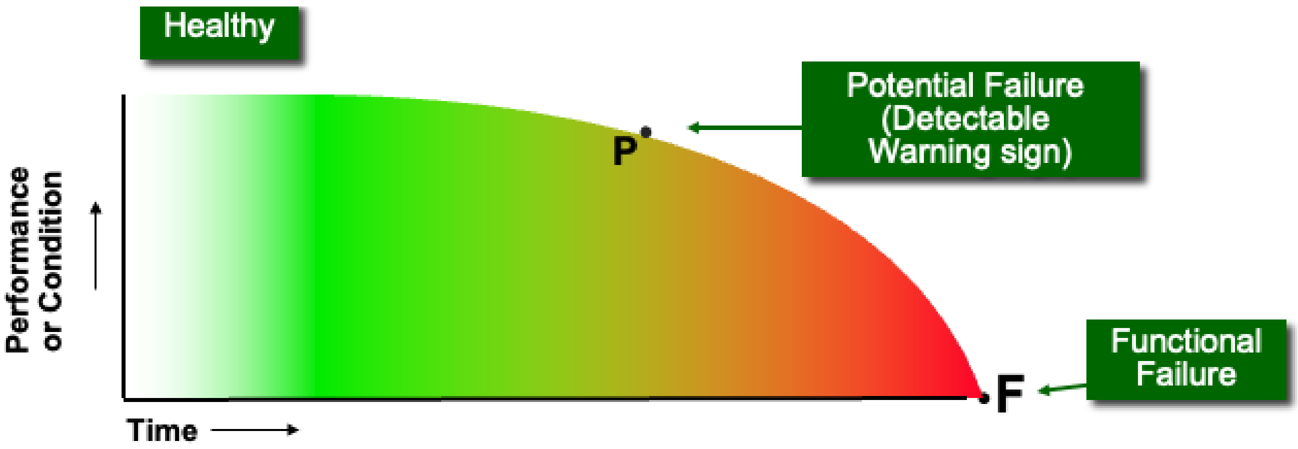
Is there a clear potential failure? What is it?

What is the lead-time to failure? Is this usable?

Should this On-Condition Task be done?
Will it reduce the likelihood of failure and impact on safety or the environment to a tolerable level? Is it cost-effective?

On-Condition (Condition based) Tasks

- Predictive, or Condition-based maintenance, is about looking for potential failures (or warnings) that the equipment is in the process failing
- So that action can then be taken to change the consequences of the failure (the failure is not necessarily prevented)



Types of condition-based tasks:

- Human Senses
- Product Quality Monitoring
- Performance Monitoring
- Condition Monitoring (Dynamic, Particle, Physical, Chemical, Thermal, Electrical)

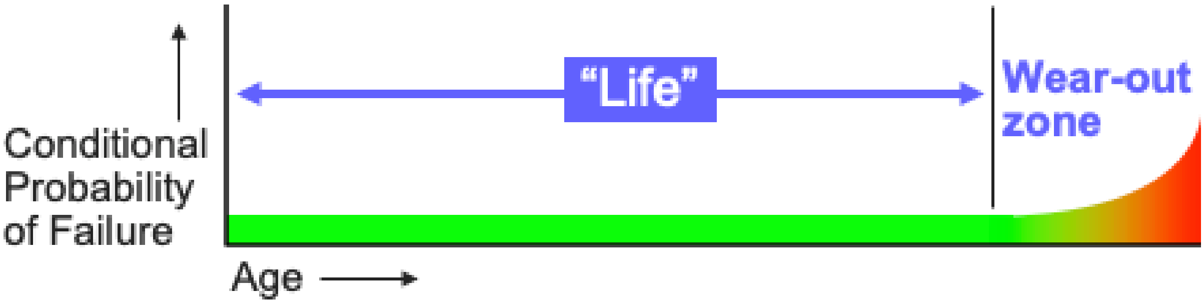
On-Condition Task Intervals and Technical Feasibility

The interval of a condition-based task is based on the warning time/ lead-time to failure, or the Potential Failure to Functional Failure (P-F) Interval.

A condition-based task is technically feasible if:

- There is a clear potential failure condition
- The P-F interval is reasonably consistent
- The P-F interval allows sufficient time to take action to avoid or minimize the consequences of failure. The task would usually be done at / the P-F interval 1/3 for safety consequences.

Scheduled Overhaul and Replacement



- Scheduled Overhaul and Scheduled Replacement involve the overhaul or replacement at a fixed time, regardless of condition.
- The task needs to be carried out before there is an increase in the conditional probability of failure.
- For such a task to be technically feasible, there must be an age at which the conditional probability of failure increases rapidly, and most items must survive up to that age.
- In addition, for the scheduled overhaul, the task must restore the original resistance to failure.

Failure Finding

Failure-finding involves checking hidden functions (protective devices) to determine whether they have failed. If the protective device is in a failed state, it is repaired. If it works, it is left as is. Therefore, a protective device will be in an operational state immediately after the test. The longer the device is left between tests, the greater the probability it will be in a failed state.

Therefore, the more frequently the failure-finding task is carried out, the lower the probability that the protective device will be in a failed state, and the lower the probability of multiple failures.

This allows target levels of risk to be achieved

A failure finding task is technically feasible if:

- It is possible to check that the protective device has failed without increasing the risk of a multiple failure
- The task can be carried out at the required interval

Failure Finding

Failure finding task intervals (FFI) are calculated using an appropriate equation.

Several equations are available. Which one is used depends partly on the consequences of the multiple failure.

The simplest equation is based on the MTBF of the protective device (Mtiv) and the desired unavailability (Utiv) of the protective device (which depends on the consequences of the multiple failure)

FFI = 2 x UTIVE x MTIVE

No Scheduled Maintenance / Redesign / Worth Doing

No Scheduled Maintenance

Under the right circumstances, No Scheduled Maintenance (or Run-to-Failure) is a viable option.

Such circumstances are that:

- The failure has financial (i.e., not Safety/ Environmental) consequences
- No predictive, preventive, or failure finding task can be found that is technically feasible and worth doing
- The policy of run-to-failure is not excessively expensive.

Redesign

Redesign in RCM is any one-time change to the asset, process, or people (as opposed to cyclic maintenance, which is carried out regularly)

It includes physical redesign, training/competence, spares, contingencies, or the addition, change, or reinforcement of procedures.

Redesign is a default task in the Decision Diagram - cyclic maintenance is considered beforehand.

Worth Doing Requirements

For a task to be selected, it must be technically feasible and worth doing.

The 'worth doing' requirements depend on the consequences of the failure:

- For failures with financial consequences, the task is worth doing if, over a period of time, the cost of doing the task is less than the cost of not doing the task
- For safety/ environmental consequences, a task is worth doing if it reduces the level of risk to a tolerable level

Basis of Task Intervals

Conditioned Based	Scheduled Overhaul Scheduled Replacement	Failure Finding
Check to see if it is failing Performance or Condition 'How quickly it fails'	Replace or overhaul because it's about to fail Conditional Probability of Failure 'How long it lasts'	Check to see if a protective device has failed 2 x MTBF x Unavailability 'How much it matters' Plus 'How reliable it is'

RCM Standards / The Outputs of RCM

RCM Standards

Why a standard?
Nowlan & Heap (1978) documented RCM.
Later "RCM" variants (streamlined/shortcut or "rigorous") often diverged from the original approach. This resulted in confusion in the market.

SAE JA1011
Defines the minimum requirements for a process to be "true RCM" (usable by any asset-intensive organization).

SAE JA1012
Practical guide that explains JA1011 criteria and additional considerations for successful application.

IEC 60300-3-11
IEC RCM application guide within Dependability Management; This is broadly aligned with JA1011/JA1012.

The Outputs of RCM

Outputs
There are two categories of outputs from an RCM analysis:

1. Maintenance tasks and intervals
   - Higher frequency tasks, which operators often do
   - Lower-frequency tasks are usually carried out by technicians or specialists
2. One-time changes ('redesigns')
   - Physical redesign recommendations
   - Spares
   - Training
   - Contingencies
   - Procedure changes

Application and Implementation

Application

RCM is usually applied to an 'item' of equipment, such as a pump, conveyor, transformer, or compressor

The process is applied by an RCM facilitator working with a multi-disciplinary team in a series of meetings.

Generally, the asset is chosen for an analysis for one of two reasons:

1. It is highly critical. This would often be determined through a site-wide criticality assessment
2. It is a bad actor in terms of a KPI such as reliability, availability, cost, safety, etc

Implementation

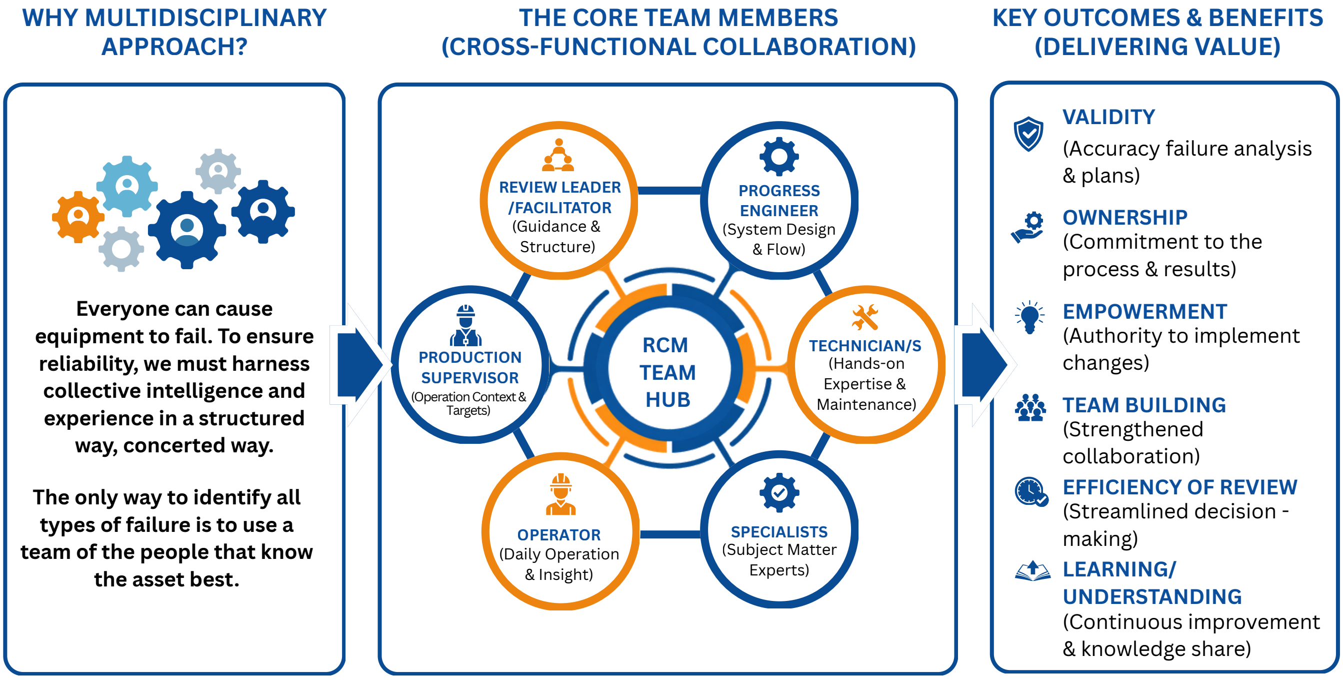
After the analysis is complete, any benefit must be realized by implementation. There are several steps to this:

1. The analysis should be audited by management to make sure they agree with the findings and give the go-ahead for implementation
2. Maintenance tasks and operating procedures need to be consolidated, grouped, written up, and entered into the management systems. Superceded tasks need to be removed.
3. Redesign recommendations need to be evaluated and implemented.

The RCM Team

Everyone can cause equipment to fail. To ensure reliability, we must harness collective intelligence and experience in a structured way, concerted way.

The only way to identify all types of failure is to use a team of the people that know the asset best.



RCM Worksheet Example

FUNCTION		FUNCTIONAL FAILURE		FAILURE MODE		FAILURE EFFECT	RCM DECISION			
							CODE	TASK OR ACTION	FREQ	BY
1	To transfer material from the inlet hopper to the stockpile at a rate of up to 200 m3 per hour	A	Unable to transfer matarial at all	1	Main drive motor bearing fails due to normal wear	The conveyor will stop and an alarm will sound on the control panel. Time to replace the bearing 4 hours	EF1	Monitor conveyor motor bearing vibration using hand held vibration monitor	1 Month	Con-Mon Technician
				2	Conveyor belt splice separates due to normal deterioration	The splice is likely to come adrift gradually to start with, but when it eventually fails altogether, the belt will break and the transfer will stop. Repairs take 4 to 12 hours depending on the amount of damage to the belt, where it occurs and the extent of secondary damage.	EF1	Visually check condition of conveyor splice	1 Day	Operator
2	To contain the material during conveying	A	Fails to contain the material during conveying	1	Belt mistracks due to improper splicing	If splicing is done poorly, the splice could break. If the splice is not perpendicular to the edge of the belt, the belt may mis track and run off centre. This could lead to material falling off, or damage to conveyor components if unintentional fouling results	EF5	Reinforce procedure for splicing ensuring the splice conforms to the dimensional accuracy defined in the procedure		
3	To be incapable of running back when the conveyor is stopped	A	Capable of running back when the conveyor is stopped	1	Hold back device fails	The conveyor should be emptied before it is switched off. If this is not done and the hold back device fails, the conveyor could run backwards. This could damage conveyor equipment and, in a worst case scenario, cause injury to personnel	HS4		1 Year	

ANALYSIS 1 OF 2

Analysis Information

Instructions: Record the identity of the asset(s) under analysis, who was involved in the review, when it took place, and which source documents were used. This page forms the audit record for the analysis that follows.

Asset / System Identification

ASSET / TAG NUMBER

ASSET DESCRIPTION

SITE / LOCATION

CRITICALITY (E.G. HIGH / MEDIUM / LOW, OR KPI-BASED)

Analysis Date(s) & Location

ANALYSIS START DATE

ANALYSIS END DATE

LOCATION / VENUE

REVIEW LEADER / FACILITATOR

Participants

NAME	ROLE	ORGANISATION

Documents & References Used

- [ ] P&IDs / process flow diagrams
- [ ] Spare parts / BOM records
- [ ] General arrangement / layout drawings
- [ ] HSE / risk assessments
- [ ] O&M manuals / OEM documentation
- [ ] Previous RCM or FMEA studies
- [ ] Maintenance & failure history (CMMS)
- [ ] Operating procedures

OTHER DOCUMENTS / REFERENCES

ANALYSIS 1 OF 2

Operating Context Worksheet

Instructions: Before beginning the RCM analysis, capture the operating context of the asset below. This information anchors every function, failure mode and consequence decision that follows — take time to be thorough and specific.

Asset name / Tag number: ________________________________ Analysis date: ____________ Facilitator: ____________________________

1 Asset / equipment description

Name the asset(s) under analysis, the fleet covered (if applicable), and a brief history.

2 Business & process context

Describe the wider business and process. Is it batch or continuous flow? Duty/standby arrangement?

3 Inputs and outputs

What goes into the asset (materials, energy, information) and what comes out?

4 Customers

Who are the internal or external customers of this asset's output?

5 Operations & maintenance

Who operates and maintains the asset? Describe the existing maintenance programme in general terms.

6 Operating / maintenance windows

Are there any fixed operating windows, shutdown periods, or maintenance access windows?

7 Location & environment

Location and implications: clean/dirty, wet/dry, hot/cold, hazardous area, etc.

8 Analysis boundaries

What is included in and excluded from this RCM analysis (physical and functional boundary)?

9 Reason for the analysis

Why is this analysis being carried out now? Objectives and past performance / problem history.

RCM WORKSHEET

#	FUNCTION	#	FUNCTIONAL FAILURE	#	FAILURE MODE

ASSET: ____

#	FAILURE EFFECT	CODE	RCM DECISION		
			TASK / ACTION	FREQ.	BY
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RCM WORKSHEET

#	FUNCTION	#	FUNCTIONAL FAILURE	#	FAILURE MODE

ASSET: ______________________________

#	FAILURE EFFECT	CODE	RCM DECISION		
			TASK / ACTION	FREQ.	BY
1					
2					
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Keep every RCM review on track

This workbook gives your team a single, consistent place to run a Reliability Centered Maintenance analysis end to end — from operating context through to signed-off maintenance tasks — without re-explaining the method every time.

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