# Supersedes

1.1 Revision A

# Process Owner

* 1. Triumph Group, Inc. (TGI) - Enterprise Supply Chain Management (ESCM) – Site and Supply, Work Transfer (WT).

# Applies To

* 1. Triumph Group - Enterprise Supply Chain Management, Work Transfer, Supplier Development, TGI Business Unit Supply Chain; Supplier Quality Assurance and Triumph Operational Business Units.

**Note: The release of this procedure and the noted effectivity is the minimum requirement for Work Transfers that all TGI Companies must immediately comply.**

# Purpose

The purpose is to identify, plan and execute new, temporary or permanent transfer(s) of component (part) manufacturing (Work Transfer). This process also defines activities to ensure conformity of the work to all applicable requirements during the component transition process.

# Scope

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| 5.1 | This process applies to Direct Product (Original Equipment Manufacturer (OEM) andin-production spares) and Maintenance, Repair, and Overhaul (MRO). |
| 5.1.1 | The process controlled by this document begins after the new / alternative source or manufacturing site or location has been identified and approved through either Sourcing Board SCMP 7.4 or TGI Operations site leadership review (as defined by the site). |

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| 5.1.2 | This may include the following transfers and organization ownership: |
|  | TGI to Supplier (Make to Buy) – TGI Enterprise Supply Chain and Business Unit (BU) Functional Groups |
|  | Supplier to TGI (Buy to Make) – TGI BU Operations and BU / Site Supply Chain |
|  | Change of Supplier A to Supplier B (Buy to Buy) – TGI Enterprise Supply Chain and BU Functional Groups |
|  | Change of Supplier Site A to Site B – includes moves internal to Supplier (Buy to Buy) – TGI Enterprise Supply Chain and BU Functional Groups |
|  | TGI to TGI (Make to Make) – TGI BU Operations and BU / Site Supply Chain |
|  | **Note:** New Product Introduction (NPI) is not considered part of the Enterprise Work Transfer process. The Work Transfer team’s involvement in programs implementing concurrent engineering and / or significant pre-production resourcing efforts will be evaluated by the Site and Supply Team on a case by case basis. |

# Reference Documents

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| SQAM001 | Triumph Supplier Quality Assurance Manual |
| SCMP 1.1 | Triumph Group Supply Chain Management Document Control |
| SCMP 7.4 | Sourcing Board |
| CMPT | Cost Management Project Tracker |
|  | Lessons Learned Database |

***Note:*** The documents listed above are located on the TGI Portal except for the Cost Management Project Tracker and the Lessons Learned Database, which are located on SharePoint. In all instances, the working documents and forms shall be stored on SharePoint.

# Definitions and Acronyms

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| triumphsupplysource.com | Triumph Supplier Portal. Website that houses the Triumph Group approved Supplier list, Supplier performance and Supplier requirements. Often referred to as “the system” or “the portal.” |
| BU | Business Unit |
| CMPT | Cost Management Project Tracker |
| EAR | Export Administration Regulations |
| ECCN | Export Control Classification Number |
| ESCM | Enterprise Supply Chain Management |
| FAFP | First Article Flow Plan |
| MRO | Maintenance, Repair and Overhaul |
| NPI | New Product Introduction |
| OEM | Original Equipment Manufacturer |
| OpCo | Operating Company |
| PRB | Procurement Review Board |
| RAIL | Running Action Item List |
| S&ST | Site and Supply Team – includes Site or OpCo Supplier Quality |
| SCMP | Supply Chain Management Procedure |
| SME | Subject Matter Expert |
| SQA | Supplier Quality Assurance |
| SSB | Source Selection Board |
| TGI | Triumph Group, Inc |
| WT | Work Transfer |

# Responsibilities

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| 8.1 | It is the joint responsibility of the initiator (Buyer, Commodity /Strategic Sourcing lead, Supply Chain Manager / Director, SQA) to identify and ensure that all project risks are addressed with executable mitigations and to use the agreed tools and processes. |
| 8.2 | The Work Transfer Lead is responsible for scheduling and conducting cross-functional team meetings for the application of this procedure. |
| 8.3 | The forms noted within this procedure shall be applied in their entirety unless otherwise determined by the Work Transfer Lead. |

# Procedure

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| **9.1** | Planning |
| 9.1.1 | Work Transfer leads are required to identify the tools and processes that shall be used to manage the project and mitigate all risks. |
| 9.1.2 | Upon notification of a potential Work Transfer, the Work Transfer Lead will assemble a cross functional team from the BU SME’s and perform the following: SCMP 7.5 (a) to confirm the project meets the minimum criteria for Work Transfer acceptance including EAR and ECCN criteria. Upon this initial review and analysis of the Project, if the criteria defined in SCMP 7.5 (a) are not met, the Work Transfer Project shall not be progressed until closure, or planned closure, of all open actions. |
| **9.2.** | First Article / Last Article |
| 9.2.1 | All work transfers First Articles shall be in accordance with AS9102, and may require at a minimum a delta First Article. Supplier Quality shall determine the level of FAI required and shall consider any proposed exclusions in accordance with AS9102. |
| **9.3** | **Knowledge Transfer** For both Make to Make and Buy to Make only – the following shall apply: |

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| 9.3.1 | Information is gathered regarding product and process definition, requirements, tooling, quality levels, costs, etc. in order to provide assurance the project success. For example, production processes are often not completely captured in manufacturing operation and tooling instructions. |
| 9.3.2 | There may be certain steps or tasks taken for granted that may not be included in the documentation provided to the destination source. As such, it is suggested that the pre-transfer manufacturing process be reviewed / audited by members of the transfer team to document hidden (undocumented) factory steps, operator actions, and lessons learned during manufacture at the exit source. |
| 9.3.3 | This can be a sensitive issue for the workforce at the exit source, and as such, should be considered carefully. Ideally, this should be done during routine audits under the quality system of the controlling source, ensuring documentation of all actions and information. |
| 9.3.4 | This activity will provide the basis for the determination as to whether a Last Article Inspection is necessary to mitigate the risk of unknown or hidden process/product knowledge. |

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| **9.4** | **Execution** |

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| 9.4.1 | Upon confirmation of the chosen Supplier(s), the Work Transfer Lead will apply SCMP 7.5 (b) Pre-Assessment SSB. Each action arising from the Pre-Assessment SSB must be closed or have a proposed closure plan and date before application of SCMP 7.5 (c) Project Risk Assessment. |
| 9.4.2 | Post application of SCMP 7.5 (b), the Work Transfer Lead will apply SCMP 7.5 (c) Project Risk Assessment. |
| 9.4.3 | Upon release of the First Article Purchase Orders, the Work Transfer Lead will, with the cooperation of the chosen Supplier(s), apply SCMP 7.5 (d) First Article Flow Plan and SCMP 7.5 (e) Overlap Plan, as appropriate. |
| 9.4.4 | In all instances, the actions arising from the application of SCMP 7.5 shall be captured via Form 7.5 (f) Rolling Action Item List (RAIL). |
| 9.4.5 | The Work Transfer Lead shall also complete supporting documents (as determined by the Work Transfer Lead) appropriate to managing the Project. See Figure 1. |

# 9.5 Escalation Process

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|  | Should the Work Transfer Lead identify any item / issue that demonstrates significant risk to the project plan, it shall be the responsibility of the Work Transfer Lead to escalate the issue to achieve risk closure, as applicable. |

# 9.6 Lessons Learned

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|  | Lessons learned shall be reviewed during and at the closure phase of any Work Transfer, and where appropriate shall be communicated or implemented into the process. |

**9.7 Project Closure**

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|  | The work Transfer Lead shall complete SCMP 7.5 (g) Work Transfer Closure Form and obtain the signature of the Work Transfer Director acknowledging project closure. The Work Transfer shall be deemed complete when the individual Triumph site quality requirements for acceptable lots has been reached. |

# 9.8 Appendices and / or Flow Charts

# Figure 1 – Work Transfer Process

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# 10. Required Forms

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|  | Form SCMP 7.5 (a) Work Transfer Package Analysis – Pre-Assessment PSB |
|  | Form SCMP 7.5 (b) Work Transfer Package Analysis – Pre-Assessment SSB |
|  | Form SCMP 7.5 (c) Work Transfer Preliminary Risk Assessment – Project Risk Assessment |
|  | Form SCMP 7.5 (d) First Article Flow Plan |
|  | Form SCMP 7.5 (e) Overlap Plan |
|  | Form SCMP 7.5 (f) Work Transfer RAIL |
|  | Form SCMP 7.5 (g) Work Transfer Project Closure Form |

# 11. Required Records

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|  | Document retention shall be in accordance with TGI Procedure SCMP 1.1. Pertinent data, project execution information and the Work Transfer Closure Form – SCMP 7.5 (g) should be retained at the individual project folder within the Enterprise Work Transfer SharePoint site. |

# 12. Required Records

# See Triumph Group Enterprise Supply Chain Management, Work Transfer Portal

# 13. Revision History

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| **Revision Level** | **Description of Change** | **Effective Date** |
| Original | New Document | 25 September 2017 |
| A | Added controlled forms, revised para. 3.1 | 09 January 2018 |
| B | Document Revision / Forms Update | 16 September 2019 |

1. **Approvals (Authorizing Signatures on File)**

Rev A

Sr. Director ESCM, Triumph Group 09 January 2018

Rev B

Sr. Director ESCM, Triumph Group 12 September 2019