**A logo with text on it

AI-generated content may be incorrect.Operations & Management** **Building System Change Management Process** **& Gap Analysis Template**

**Baseline Practice**: O0.1 – Change Management & Gap Analysis

**Applicable Asset Classes**: Office, ESC, OAR, Light Industrial, Healthcare, Universal, and MURB

|  |
| --- |
| ***Instructions:***  *All grey italic text with borders are instructions to help you prepare the required Baseline Practice for your building Change Management Template.*   1. *Replace all* [blue text in brackets] *in the document with building system specific information* 2. *Where required, complete the necessary tasks, or engage a third-party consultant to complete the tasks so that you are able to fill the relevant sections of the template.* 3. *Delete all grey italic text when you have filled all relevant sections with building specific information.* |

**Building System Change Management Process**

[Insert Building Name and Address]

[Insert Name of Organization]

[Insert Contact Information]

# Change Management Overview

[Insert Project Overview]

**Project Name/Title:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Type of Project:**

☐ Retrofit

☐ Maintenance

☐ Other (Specify): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Description of Proposed Change**

(Provide a detailed description of the retrofit or maintenance project affecting the building data systems.)

# Stakeholder Involvement

[Insert Stakeholder & Involvement]

**List of Key Stakeholders:**

(Include names, roles, and contact information)

**Stakeholder Approval Status:**

☐ Approved

☐ Pending

☐ Rejected

# Risk Assessment

[Insert Stakeholder & Involvement]

**Potential Risks Identified:**

(List risks associated with the proposed change)

**Mitigation Strategies:**

(Outline strategies to mitigate risks.)

# Implementation Plan

[Insert Stakeholder & Involvement]

**Task:**

**Schedule:**

Start Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_ End Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Resources Required:**

(Include materials, personnel, and budget details.)

**Steps to Be Followed:**

(Provide a step-by-step process for implementation.

# Monitoring and Validation

[Insert Metrics & Monitoring Plan]

**Performance Metrics:**

(Define metrics to measure success post-implementation)

**Monitoring Plan:**

(Describe how and when the performance will be monitored)

# Documentation and Archival

[Insert Stakeholder Documentation]

**Documents Attached:**

(Attach relevant drawings, plans, or reports)

**☐ Yes (List documents): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**☐ No**

**Change Record Log:**

(Maintain a record of changes made and their outcomes)

**Building System Gap Analysis (Annual)**

# Building System Desired Outcome

[Insert System Desired Outcome]

* Define the Desired Outcome
* Establish the goals for the integration, such as centralized monitoring, improved energy management, or predictive maintenance.
* Identify the key data points that need to be integrated (e.g., HVAC, lighting, access control systems, IoT devices).
* Provide a detailed description of the retrofit or maintenance project affecting the building data systems.

# Inventory Existing System and Software

[Insert Systems and Softwaret Inventory]

* Document the building systems (e.g., HVAC, lighting, elevators) and their control platforms.
* List all software tools being used (e.g., building management systems, energy management platforms).
* Note each system's data capabilities, communication protocols, and reporting features.

***Helpful Tip!***

***Note:*** *Your building vendors can assist with the execution of this section. Reach out to the system maintenance team or installing contractor.*

# Assess Current Integration

[Insert Assessment of Current Integration]

* Identify which systems are already integrated into the software platforms.
* Determine how data flows between systems and software.
* Is data exchanged manually or automatically?
* Are there gaps or delays in data transfer?
* Review data accuracy and consistency across platforms.

# Identified Gaps

[Insert Identified Gaps]

* Missing Data Points: Are there key metrics or systems not captured in the current setup?
* Incompatibilities: Are there systems that cannot communicate due to protocol or format differences (e.g., BACnet vs. Modbus)?
* Data Quality Issues: Is the data inaccurate, incomplete, or redundant?
* Integration Limitations: Are there software tools or Application Programming Interfaces lacking the necessary capabilities for full integration?

# Risks and Impacts

[Insert Risks and Impacts]

* Determine the operational or financial impacts of the gaps (e.g., inefficiencies, higher energy costs, reduced equipment lifespan).
* Assess risks associated with incomplete or inaccurate data, such as compliance failures or missed maintenance needs.

# Action Plan

[Insert Action Plan]

* Address Data Gaps: Recommend strategies to integrate missing systems (e.g., upgrading software).
* Improve Compatibility: Suggest solutions for protocol conversion or adopting interoperable platforms.
* Enhance Data Accuracy: Implement data validation processes, error-checking mechanisms, or sensor recalibration.
* Prioritize Investments: Focus on high-impact systems or metrics first to optimize resource use.

# Sign-Off and Approval

[Insert Sign-Off and Approva Documentsl]

**Prepared By:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_

**Reviewed By:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_ Date: \_\_\_\_\_\_\_\_\_\_\_

**Approved By:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_