



FM MAP™ Model Trial – Scope of Work

This is the standard scope of work to get started with a FM MAP™ Model setup and trial. This scope describes the services included in the published flat rate fee. Additional fees apply for additional scope and imposition of any contract and procurement conditions.

This initial scope of work is provided to allow your organization to test of the FM MAP™ approach on a limited, no risk, basis as a proof of concept. After 30 days, either party can cancel with no obligation, or we can proceed with the next scope of work (to be defined as part of this work).

What is the FM MAP™ Model?

The FM MAP™ (Management and Planning) Model is an approach for integrating your organization's property-related data from various systems and data sources into one easy-to-use Microsoft Power BI data model and associated set of reports.

It is a facility-centric data model that organizes your data to facilitate automated and adjusted data integration so that you can use the data you already have in various corporate systems and facility point solutions for improved management and facility planning.

This is not a separate software system – it is a data model and process developed using Microsoft's Office 365 tools for data management, processing, and display. This means there will be little or no additional licensing and basic software support costs for most organizations. It also means that skilled users can customize and expand the model approach as needs change and capabilities grow.

The benefit of the FM MAP™ is to quickly have a proven facility/property data model with reporting setup and operational for your organization.

FM MAP™ Model Kickoff Meeting

An initial meeting with Facility Issues and facility/property department decision makers will be held via Zoom or MS Teams.

The purpose of this meeting is to overview the FM MAP™ approach, identify the desired scorecard/dashboard content (high level), identify the source data systems for the contents (and contact person for each), define the project team, and establish the trial milestone schedule.

During this meeting we will discuss the short, medium, and long term desires with respect to facility data and reporting as a context for the trial and likely scope of subsequent work. We will also select the 3 data sets and initial report (one primary audience) to be included in the trial.

Data Source Review Meetings

A data review meeting with Facility Issues and the contact person for each data source will be held via Zoom or MS Teams.

The purpose of these meetings is to review the available data “fields” from the system and define the trial data file structure. An example data set will be provided to Facility Issues to use for customization of the FM MAP™ templates for the trial.

The most likely data sets include:

- List of properties and demographics (required, not part of the 3 optional data sets)
- Space data by property (GSF, NSF by type of space)
- Actual operating costs (current year by month and past year by month)
- Operating Budget (current year, past year)

Report Wireframe Review Meeting

A working meeting with Facility Issues, the project manager, and others as designated, will be held via Zoom or MS Teams to discuss the desired trial report.

An example report will be used to start this discussion of:

- Primary audience for this report
- General layout and format preferences
- Selection of filters and measures to use
- Visualizations to include on the report

Initial FM MAP™ Model Setup

Facility Issues will use the data examples provided to customize the system templates and load an initial data model. Facility Issues will build a custom report with the data based on the results of the report wireframe meeting.

Specific issues with the data will be identified for discussion during the review meeting

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Reporting Review & Training

A review and training session with Facility Issues, the project manager, and designated users, will be held via Zoom or MS Teams.

During this session, Facility Issues will:

- Overview the trial system setup and operation
- Provide instructions for data update
- Provide training on the reporting interface

Facility Issues will make any substantial corrections or updates identified during this session.

30 Day Trial Period

You have 30 days from the reporting review (or completion of any substantial corrections) to use the of FM MAP™ system without restriction. Facility Issues will provide phone and email technical support for all users who attended the report review and training meeting.

Next Step Scoping

During the trial period, a working meeting with Facility Issues, the project manager, and others as designated, will be held via Zoom or MS Teams to discuss the scope for the next phase of FM MAP™ development. Based on the results of the discussion on [contract issues](#) and [technical scope](#), Facility Issues can provide a firm budget and tentative milestone schedule for the desired work.