Facility Benchmarking for Cultural Institutions

An Overview of Facility Benchmarking and the IAMFA Program

Presented by
Robert Lambe, CFM
Owner, Facility Issues

Facility Issues – Our Guiding Principles

- Facilities are valuable to our organizations
  - Physical space to support organization mission
  - **Effectiveness (Increased Productivity and Quality/Value)**

- Continuous Improvement required
  - Competitiveness always increasing
  - **Efficiency (Reduced Time and Cost)**

- Obtain insight from your facility data
  - Need to capitalize on increasing amount of data
  - **Integration and Distillation (Timely and Affordable)**

- A Strategic approach is imperative
  - 80/20 principle
  - **VUCA World (Volatility, Uncertainty, Complexity, Ambiguity)**

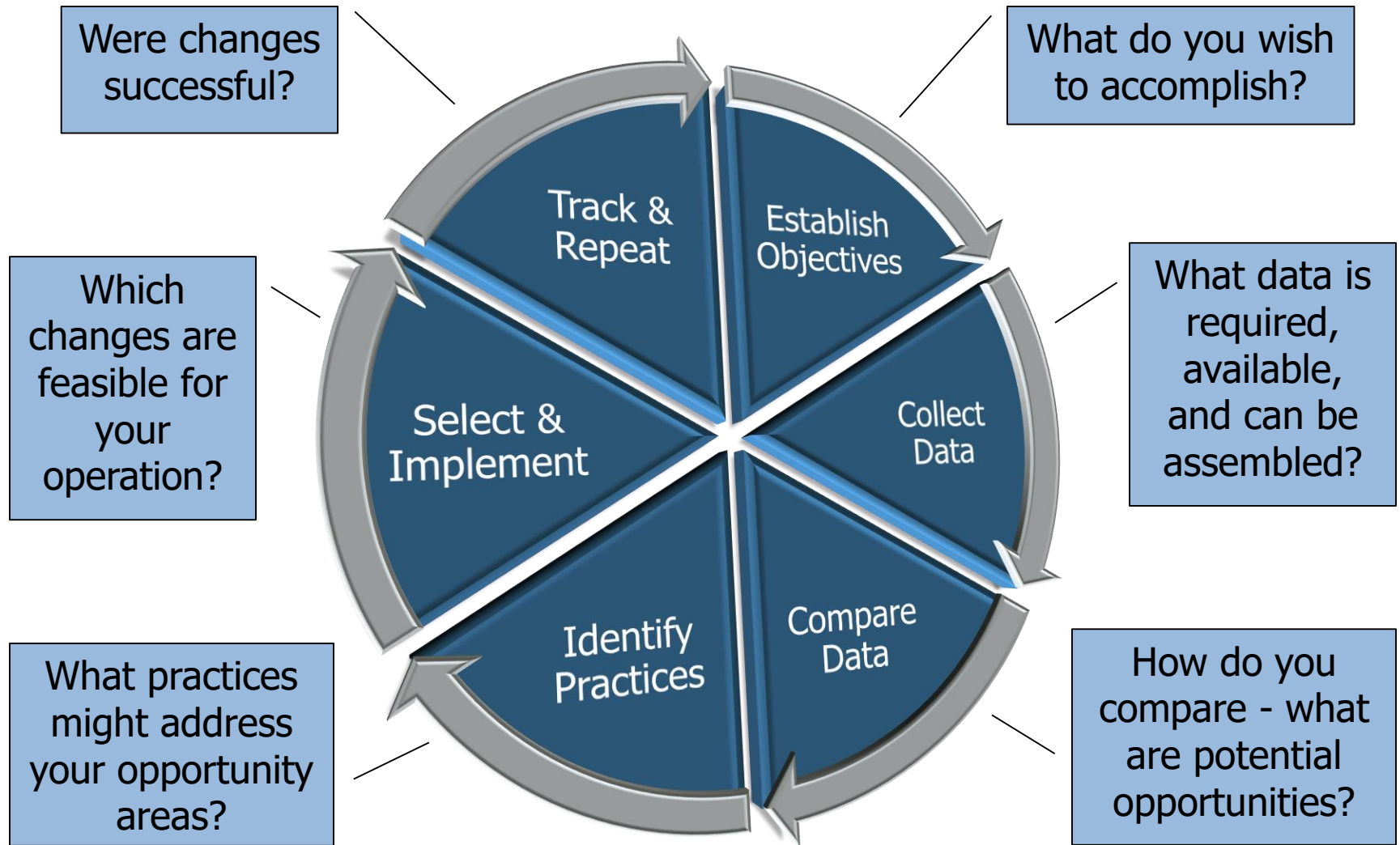FACILITY ISSUES

Facility Performance Drivers

- Organization Mission → space requirements:
  - Size, Type, Quality, Location...

    → "fixed costs"

- Organization Leadership → service levels:
  - Cleaning, Maintenance, Climate control, Condition...

    → "operating costs"

- Facility Organization determines practices:
  - Given: available resources
  - Set: standards
  - Set: equipment operating schedules
  - Schedule: PdM, PM, CM, DM
  - Apply: skills and technologies

FACILITY ISSUES

Let's Talk Benchmarking – Why?

- See where you stand:
  - Quantitative comparison of some dimension of your organization
- Easy and affordable
- Understandable
  - Easy to communicate with both leadership and staff
- Identify what you don't know & opportunity areas
  - Identify potential "best practices" that may lead to performance improvements.
- Continuous improvement approach
  - Can measure both incremental and quantum progress
- Data based on actual results (not models)
  - Shows what is achievable, reasonable, and likely

The Benchmarking Process

Were changes successful?

What do you wish to accomplish?

Which changes are feasible for your operation?

What data is required, available, and can be assembled?

What practices might address your opportunity areas?

How do you compare - what are potential opportunities?

Track & Repeat

Establish Objectives

Select & Implement

Collect Data

Identify Practices

Compare Data

VALUE OF FACILITY BENCHMARKING: https://facilityissues.com/main/value-facility-benchmarking/

FACILITY ISSUES

5

IAMFA Benchmarking Program

International Association of Museum Facility Administrators

| Home | About Us | Membership | Education | Conference | Cart | Contact | |

Join our annual benchmarking program for museums and cultural institutions.

This benchmarking program is designed for those who manage facilities for museums and cultural institutions. Over 130 institutions from nine countries have participated in the program to date. This program is an optional additional service run by Facility Issues, endorsed by IAMFA, and consists of two main parts: a benchmarking survey and a benchmarking workshop.

For more info on IAMFA visit: https://www.iamfa.org/

FACILITY ISSUES

IAMFA Benchmarking Program

- Endorsed by IAMFA, Run by Facility Issues
- International participation
- Annual benchmarking program since 2001
    - Benchmarking Space & Cost Program
    - Best Practices Workshop (day prior to IAMFA annual meeting)
- Related options
    - Small Institution (Core Metrics) Program – simpler version
    - Critical Facilities Program – more focus on reliability
    - Occupant Satisfaction Surveys
    - Facility Metrics / Scorecards – custom assignments
    - Benchmarking as part of FMX CMMS – simpler & integrated

For more info, visit: https://facilityissues.com/cultural-institutions/

Can Enter Data in Online Forms

MY PROPERTIES

Organization Info
Total 2018
Exhibition Center
Office and Education Site
Historic residence

Add Property

COST SURVEY: MUSEUMS & CULTURAL INSTITUTIONS

Section A: Organization Info » Organization Demographics

NEXT SECTION »

Purpose: Data reported in this section will be used to identify similar organizations and may be used by the participants to filter the reports. Some data reported in this section defines the units of measure or is otherwise used to administer the survey and is not included in the reports (these are identified and your actual data will not be reported). **This section is required.**

☐ *Check here if the following section does not apply to you.*

expand all | collapse all

A1   ABOUT YOUR ORGANIZATION

Organization name and address: Example Museum

Type of organization: Cultural-Science and Technology Museum ▼ ✳ ✓ ⓘ

Ok to share your name? OK to identify us on the charts ▼ ✓

ⓘ 3-6 character acronym to use in the report FAL1 ✓

Where does the facility management organization report? Finance ▼ ✓ ⓘ

Facility Management Staffing Approach Outsourced- all but a few key staff ▼ ✓ ⓘ

A2   UNITS OF MEASURE

Units of measure: Metric Units ▼ ✓ ⓘ

Currency: USD-United States Dollars ▼ ✓ ⓘ

Data are for year ending: 11/30/-0001 ✳ ✓ ⓘ

◼ 30%

SURVEY LINKS

▼ Organization Info
  Organization Demographics
  Staffing Info
  Overall Budgets
  Technology Used

▶ Facility Services & Requirements

▶ Current / Best Practices

▶ Performance Survey

▶ Learning From Others

▶ Feedback

MEMBERS ONLY

SURVEY RESOURCES

• Printable Version
• Unfinished Fields

EXPLANATION

ⓘ Additional information and instructions

✓ Saved data

⚠ Error saving data

✳ Important Field

Can Upload/Download Excel Template

- Allows data by building for ALL types of facilities
- Can be faster and easier
- Allow integration with your ongoing systems/metrics.

Results are in Online Report

- Microsoft Power BI Interactive system
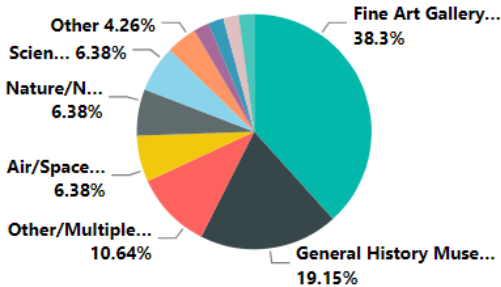- Contain multiple years (when you participated)
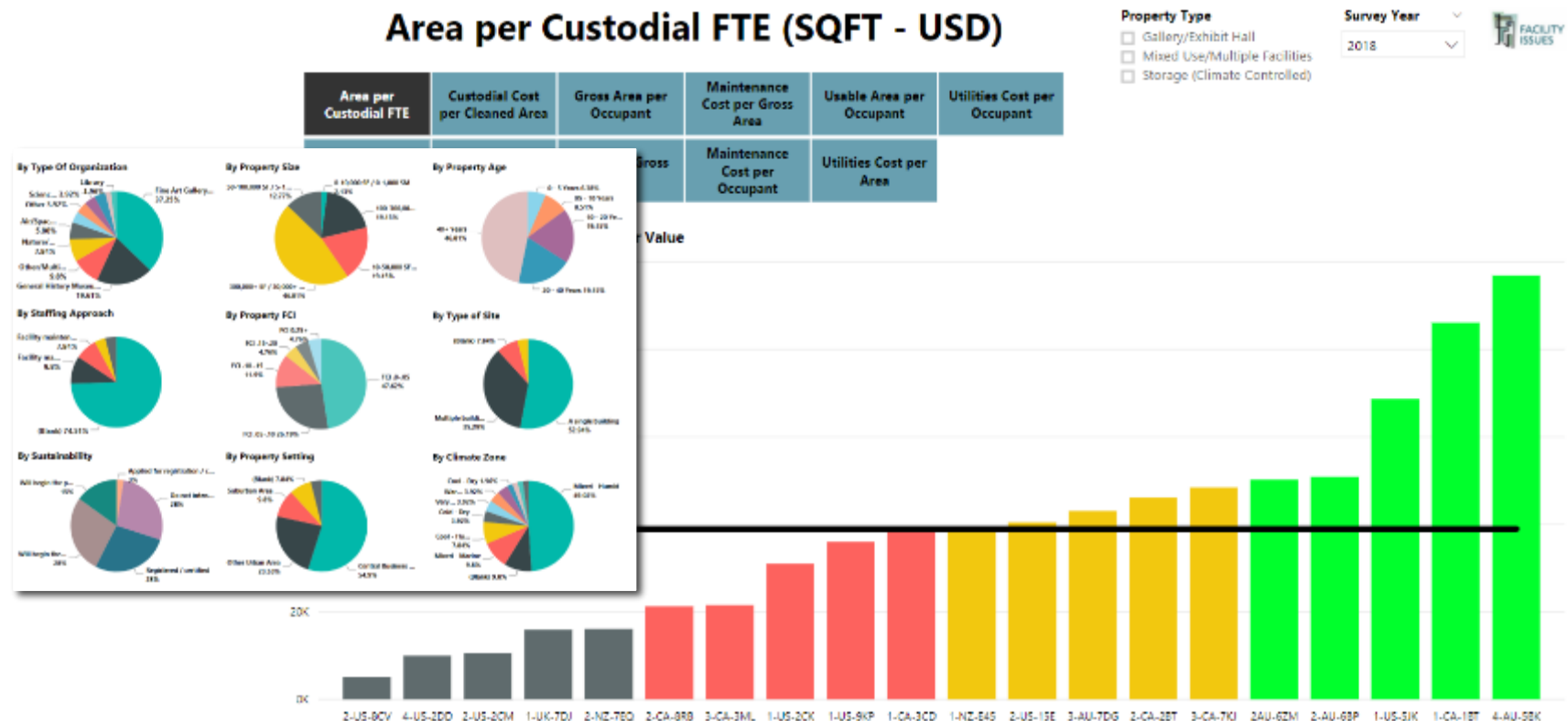
Annual Benchmarking Practices and Learning Workshop

- Equally valuable as the metrics is the ability to discuss "best practices" with other cultural facility managers.

- Day-long "pre-conference" session at the annual IAMFA conference.

- Opportunity to ask 50 international "experts" about the lessons learned in their facility operations.

FACILITY ISSUES

Example Group Demographics

By Type Of Organization
- Fine Art Gallery... 38.3%
- Other 4.26%
- Scien... 6.38%
- Nature/N... 6.38%
- Air/Space... 6.38%
- Other/Multiple... 10.64%
- General History Muse... 19.15%

By Property Size
- 50-100,000 SF / 5-... 11.63%
- 100-300,00... 23.26%
- 300,000+ SF / 30,000... 60.47%

By Property Age
- 0 - 5 Years 9.52%
- 20 - 40 Ye... 19.05%
- 40+ Years 47.62%
- 10 - 20 Years 19.05%

By Staffing Approach
- Facility maintenance i... 12.5%
- Facility mainten... 37.5%
- Facility m... 25%
- Facility maintenan... 25%

By Property FCI
- FCI .20-.25 5.41%
- FCI .10-.15 13.51%
- FCI .0-.05 43.24%
- FCI .05-.10 29.73%

By Type of Site
- A space within a building 4.76%
- Multiple buil... 38.1%
- A single building 57.14%

By Sustainability
- Will begin the proc... 19%
- Will begin the proce... 28%
- Registered / certif... 25%
- Do not intend to partici... 25%

By Property Setting
- Suburban Area 9.52%
- Other Urba... 21.43%
- Central Business District 61.9%

By Climate Zone
- Cold - Dry 2.44%
- Mixed - Hu... 4.88%
- Ver... 4.8...
- Mixed - ... 4.88%
- Cool - Humid 7.32%
- Mixed - Humid 60.98%

Survey Year: 2018

Property Type
- ☐ Gallery/Exhibit Hall
- ☐ Headquarters
- ☐ Mixed Use/Multiple Facilities
- ☐ Storage (Climate Controlled)

NOTE: Charts only include those who provided data on that topic.
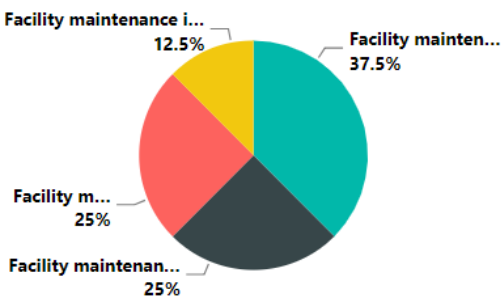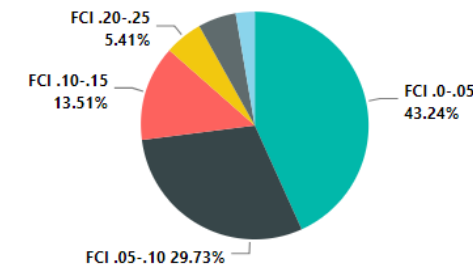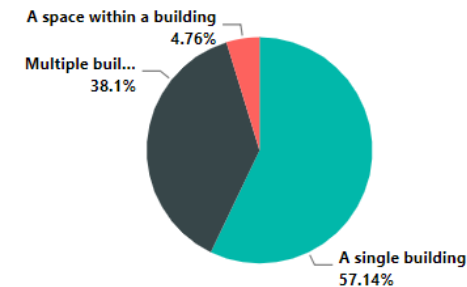
Total Sites 52

Total Buildings 412

Avg Building Size 58K
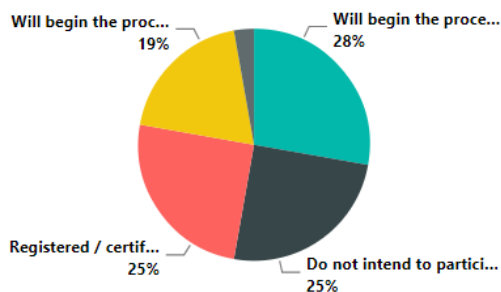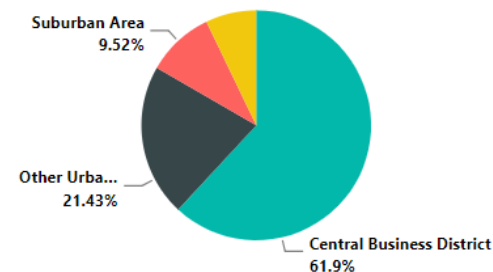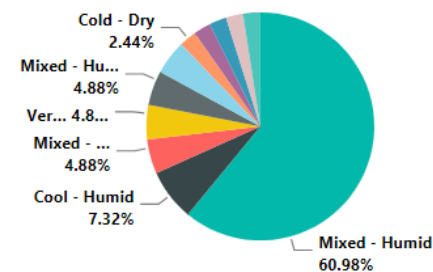
Total Facility GSF 24M

Total Operating Cost $327M

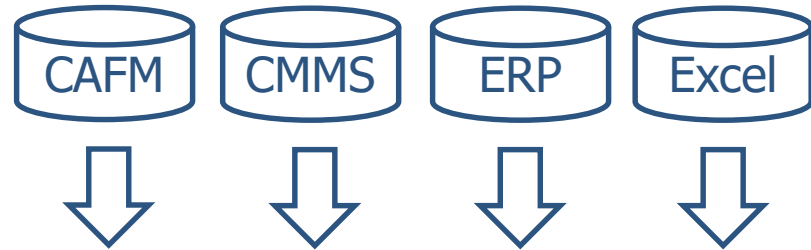FACILITY ISSUES

12

Example Chart
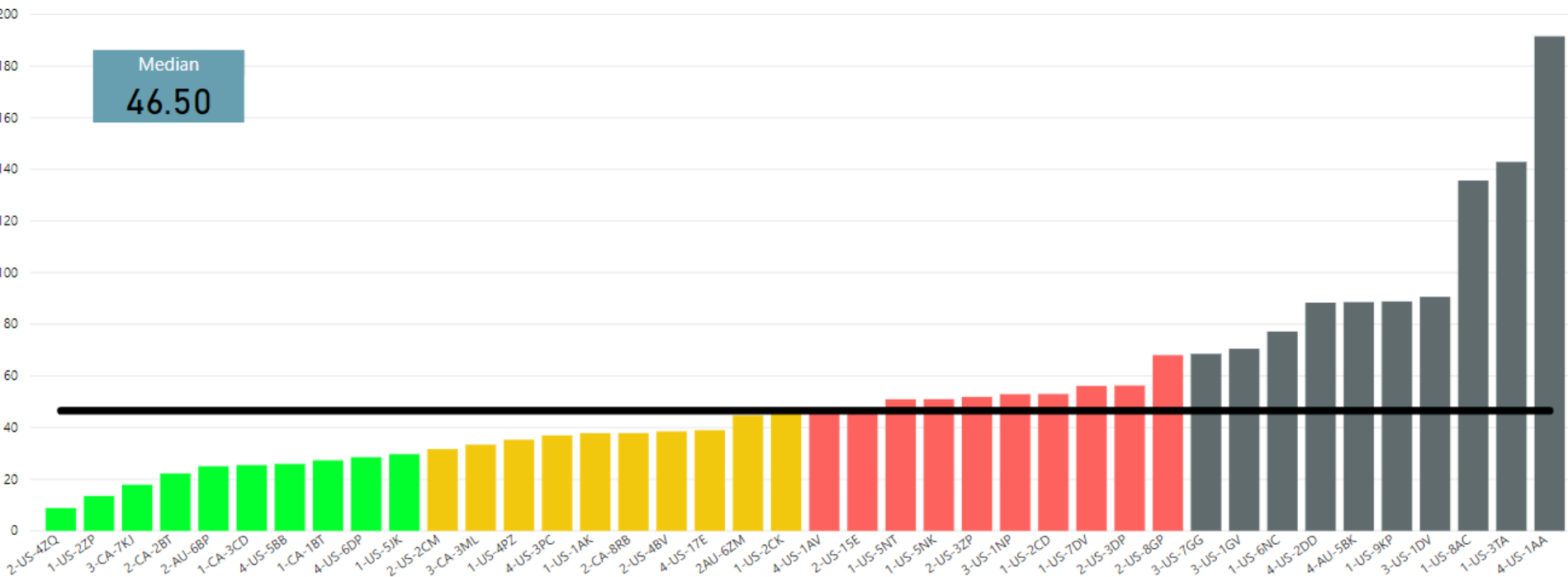
2019 Report Sections

1. Organization Demographics
2. Property Demographics
3. Property SLA
4. Space (composition)
5. Craft staffing
6. Supervisor staffing
7. Other staffing
8. Cost totals
9. Costs by quartile (various metrics)
10. Sustainability by quartile
11. FCI
12. Work orders
13. Projects
14. Site & grounds
15. Security
16. Technology practices
17. Impact of practice: custodial, maintenance, conservation, space management
18. Rated practices
19. General comments

FACILITY ISSUES

In Development

- **Excel Tools to Compile Facility Data**
  - Use export from corporate systems

- **"Layered" Reporting**
  - Benchmarking
  - Scorecard
  - Monthly Variance
  - Etc.

Common Applications:

1. Demonstrate reasonable performance
2. Evaluate resources and performance
3. Justify need for proposed initiatives
4. Forecast needs for changes/additions in facility management scope

CASE STUDIES ON THE USE OF BENCHMARKING

FACILITY ISSUES

Benchmarking Case Study:
National Gallery of Art

1. Most pertinent data for selected peer group reviewed with leadership at quarterly strategic planning meeting.

2. Data/shared practices used to guide planned initiatives.

3. Facilities group demonstrates stability and confirms reasonableness of budget & practices.

FACILITY ISSUES

Benchmarking Case Study:
Canadian Museum of History

1. Used annually to demonstrate effective management in funding discussions with Canadian Government & donors.

2. Use internally to compare year-over-year operations performance to inform where improvements might be made.

3. Use as basis for internal department goals, such as: "Cleaning cost/GSF in top 20%"

FACILITY ISSUES

Benchmarking Case Study:
Indianapolis Museum of Art
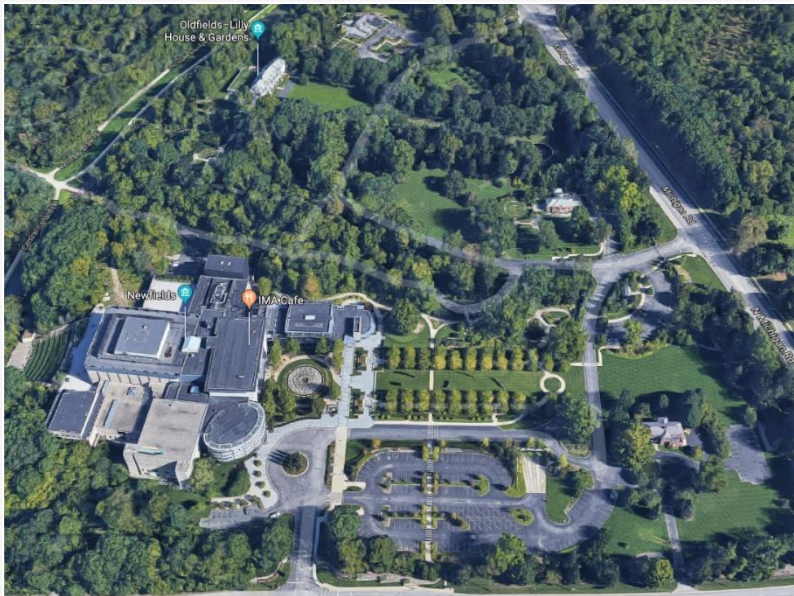
1. Facilities department realized there was a shortfall in maintenance staff.

2. Benchmarking data was used along with review of current equipment to identify reasonable staffing levels.

3. Additional craft positions approved by board.

FACILITY ISSUES

Benchmarking Case Study:

Canadian Museum for Human Rights

CBC

The ups and downs of maintenance costs and stalled elevators at the Canadian Museum for Human Rights

Museum says yearly maintenance costs for unique building are lower than at other museums

Vera-Lynn Kubinec · CBC News · Posted: Jul 16, 2018 5:00 AM CT | Last Updated: 9 hours ago

1. **Respond to Criticism:** Having independent third-party data from benchmarking can defend against perceived performance issues.

Maintenance costs lower

The museum says overall, it's doing well on its building maintenance. Fitzhenry points to an international survey of operating costs for about 50 museums and cultural institutions in Canada, the United States, and other countries.
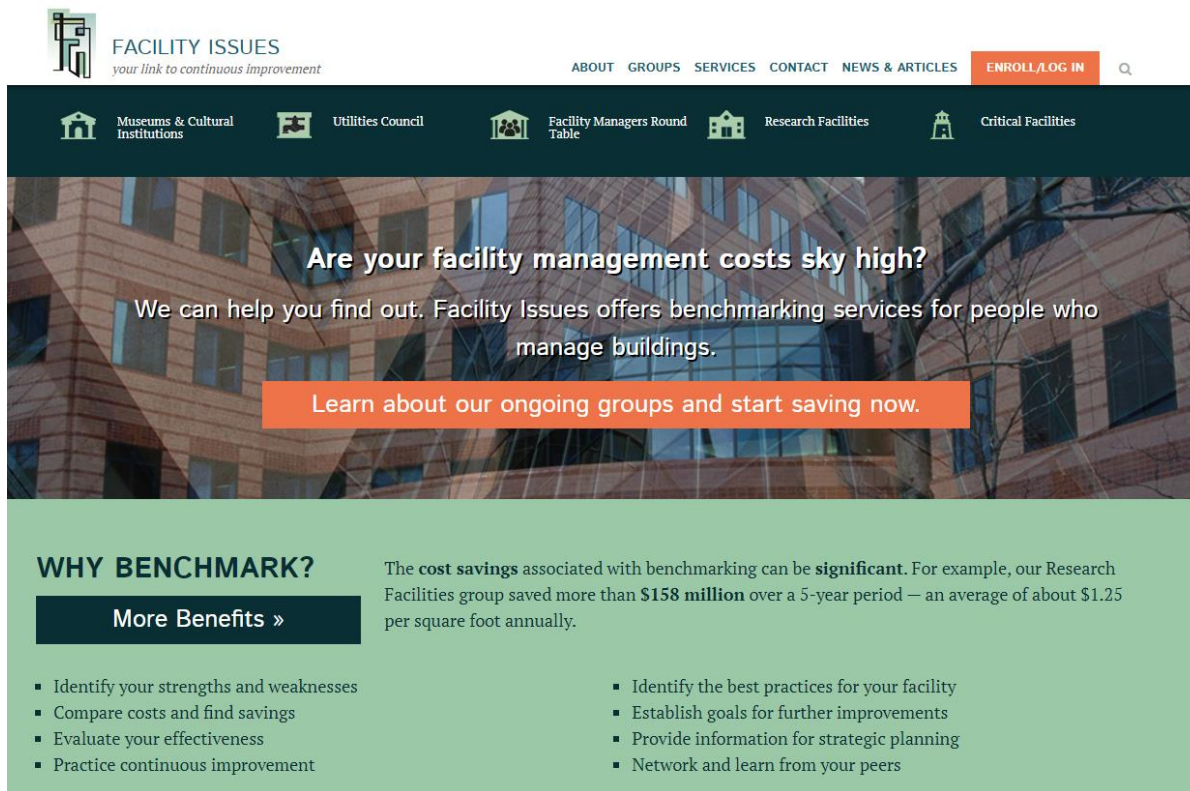
The survey, done by a New York company and endorsed by the International Association of Museum Facility Administrators, looked at maintenance cost measured in U.S. dollars per square foot of space.

FACILITY ISSUES

Benchmarking Case Study:
Exploratorium
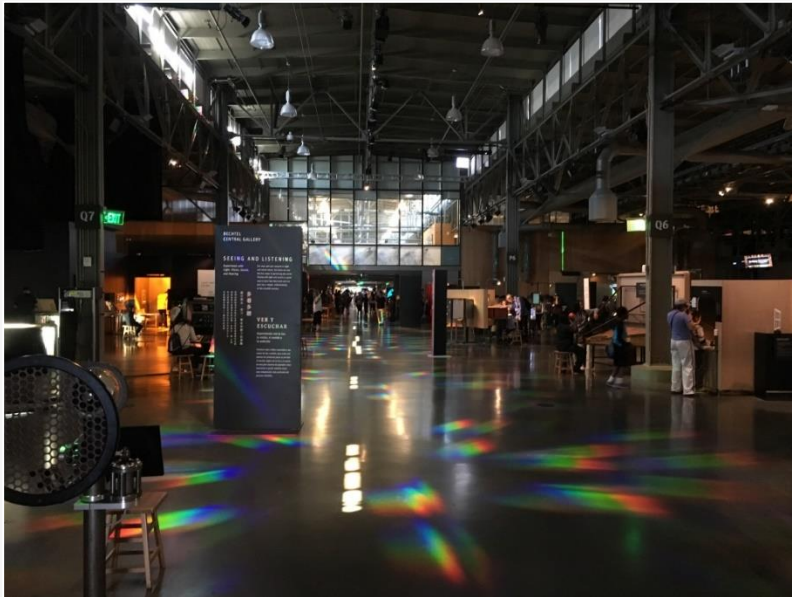
1. Facilities department needed to establish appropriate budget when moving to a new, larger, facility.

2. Used benchmarking data to justify the operating budget that would be required based on the size and nature of the the new facility.
.
3. Other institutions use similar approach with major facility expansions.

FACILITY ISSUES

For more Information:

https://facilityissues.com/

RLambe@FacilityIssues.com

315-601-6010