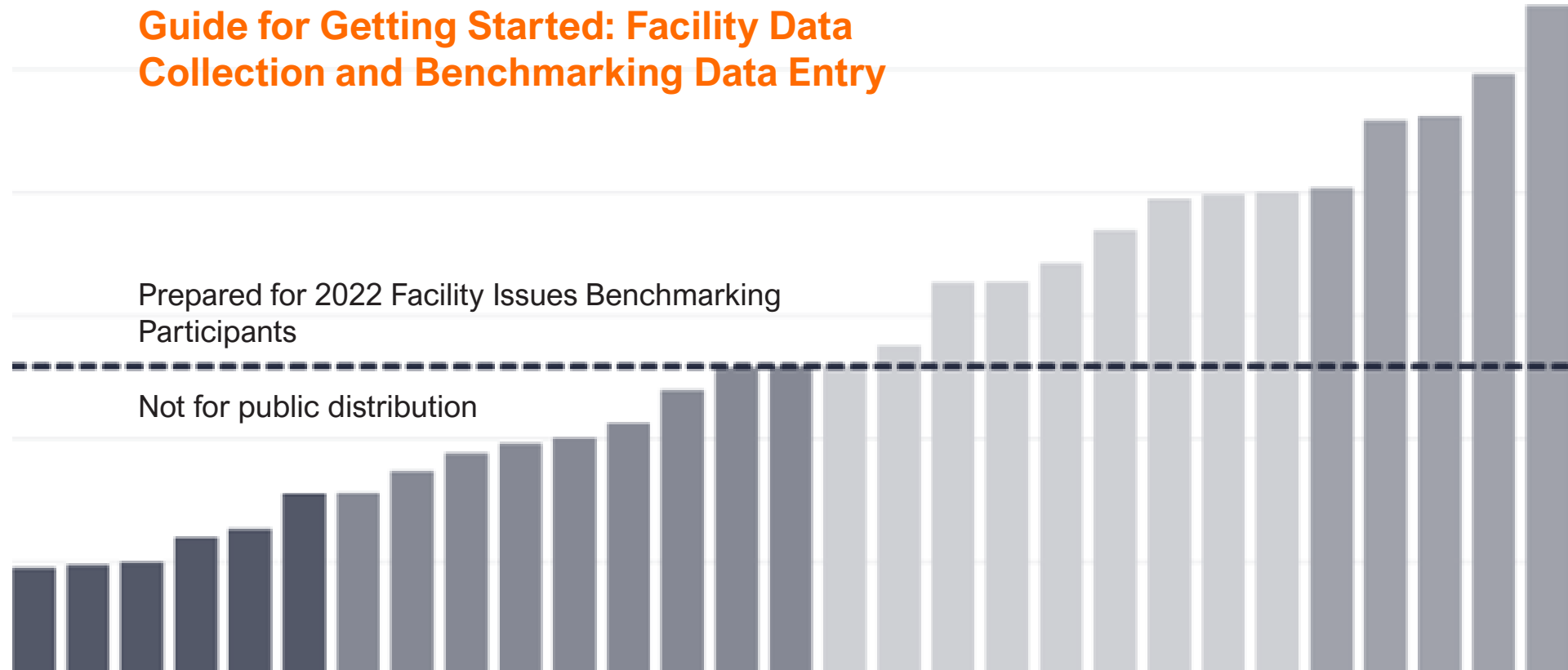


Facility Benchmarking

**Guide for Getting Started: Facility Data
Collection and Benchmarking Data Entry**

Prepared for 2022 Facility Issues Benchmarking
Participants

Not for public distribution



Contents

- Overview of 2022 Changes
- What and Why of Benchmarking
- Clarify Benchmarking Objectives
- Assemble Your Data
- Using the Facility Issues Website
- Using the Data Template
- Additional Q&A

Overview of 2022 Changes

- Minor refinement to separate FM technology staff/spend
 - Any FM Tech support staff
 - One-time FM Tech investment
- Greenhouse Gas (GHG) data
 - Department (Fleet, equipment, refrigerant releases)
 - Property Scope 1 (combustion) and Scope 2 (purchased electric)
- Add “Setpoint Drift” questions to environmental setpoint section (Cultural Group only)
- Some other minor corrections, clarifications
 - New items highlighted in light yellow on template
 - Reminder of additions last year: Work Orders, Best Practice ratings
 - Request completion of feedback section Z

What and Why of Benchmarking

Organization Review

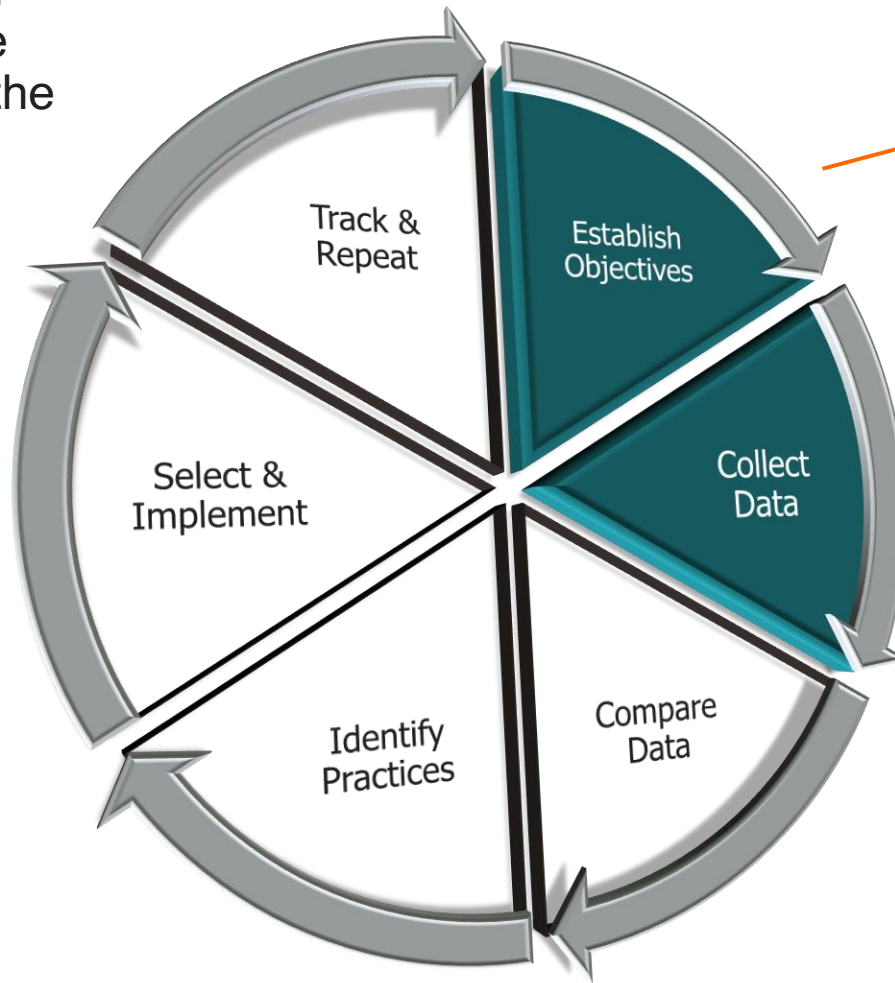
- Assess performance vs. peers
 - Document where you are an industry leader
 - Document adequate/competitive performance
 - Identify weak performance areas for review or attention
- Demonstrate responsible performance to leadership, regulators, funding organizations, etc.
- Communicate key metrics with staff and public
- Include in facility scorecards and reporting

FM Planning

- Monitor trends
- Support functional improvement initiatives
- Perform ad-hoc queries to respond to emerging issues/questions
- Share lessons learned & learn from others

The Facility Benchmarking Process

This discussion will address the first 2 steps in the benchmarking process.



Identify Your organization's objectives (What do you want to get out of the benchmarking?)

Based on objectives, determine what data to collect, where to find it, and assemble it. (What data to enter into the benchmarking forms?)

Review the data template and how to load it into the system.

Download: Get Value from the Benchmarking Process:
<https://facilityissues.com/facility-management-benchmarking/value/>

Clarify Benchmarking Objectives

Align with your organization's mission, strategy, situation, and priorities.

Typical Objectives Include:

- To quantify your situation (internally)
- To learn how you compare (vs. industry)
- To identify areas for near term attention
- To justify proposed initiatives
- To promote change/new thinking
- To network with peers
- To learn from others
- To keep getting better

Since benchmarking is an ongoing activity, the objective(s) should be re-visited each cycle to reflect changing needs and priorities.



There is a huge variety of facility-related data!

Identify the data types that align with your benchmarking priorities.

Identify the systems that have this data.

Info About Your Organization & Department

- General “demographics” and overall metrics
- Staffing – by position type
- Budget – by property and overall items
- Practices – Janitorial, Maintenance, Utilities, Space management...

Info About Your Facilities

- “Demographics” – type, location,
- Size – areas usually from CADD/CAFM systems
- Occupancy – HR reporting system
- Cost – financial reporting system
- Utility Usage/Waste – sustainability reporting, bills

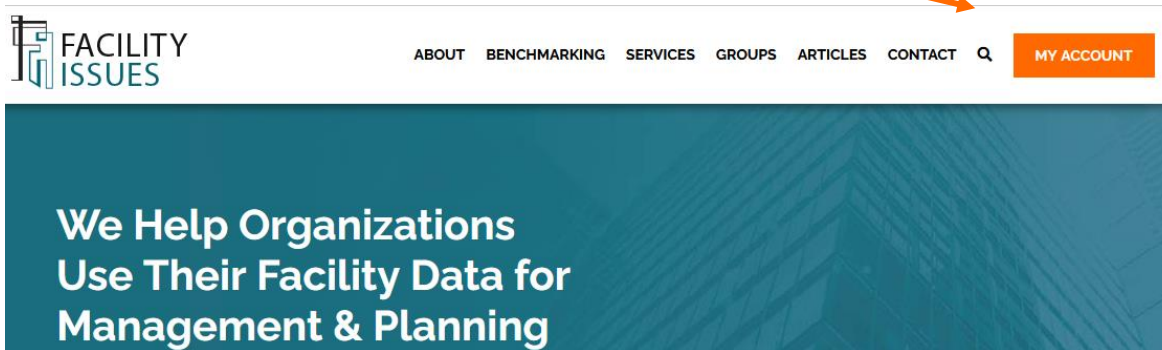
Assembling Your Data

Identify the data you will need for benchmarking and assemble it:

- Use the benchmarking template to identify specific types of data
- Start with what you have readily available:
 - Department excel files about your properties
 - Annual reports on finances, employees, staffing, etc.
 - Knowledgeable persons in department (about your practices)
- Focus on your areas of most interest:
 - What are your benchmarking objectives?
 - What topics are of current interest to your leadership?
 - Suspected areas with opportunity for improvement?
- Identify what data you want/need to build for next year
- Contact us if you want help assembling your data

Using the Facility Issues Website

1. <https://facilityissues.com>
2. Click on the orange “My Account” button




3. Login (or enroll to create new account)

Your Facility Issues Account(s)

You should have your account info as shown to the right:

- Use THIS account to enter your data
- *This account is for the results reporting (described in the reporting guide)*



The image shows a document titled "Your Facility Issues Benchmarking Account". It contains account information for a user. A red rounded rectangle highlights the "Facility Issues Website" section, which includes a link to the website, a username, a password (not included), and contact information. An orange arrow points from the first bullet point in the list to this section. Another orange arrow points from the second bullet point to the "Power BI Reporting" section below.

FACILITY ISSUES

Your Facility Issues Benchmarking Account

This document contains your account information so please take appropriate care of this document and your credentials in general.

Your Organization: **Your name**

Facility Issues Website

Link: <https://facilityissues.com/>
Username: **Your Username**
Password: *not included here because you may have reset it
Name associated with this login: **First and last name of contact person**
Email address associated with this login: **Email of contact person**
Other contact persons on this account: **Other contact persons who get communications**
2018 Sitecode (for report): **Your Code # (on reports)**

Your password can be reset once logged in or recovered using the forgot password link on the website.

Power BI Reporting

Link: <https://app.powerbi.com/>
Username: **Your Username**
Password: **Your Password**

Contact me if you need to reset your password.

Your Account Page

4. All the programs available to you will be listed on your account page (anytime you want to return to this page you can click on the orange “Enroll/Log In” menu item)

The screenshot shows the 'Your Account Page' with a sidebar on the left and a main content area on the right. The sidebar has a section titled 'SURVEY(S) ENROLLED IN' which is highlighted with an orange box. Below this section are links for 'Facility Managers Roundtable', 'Museums & Cultural Institutions', 'Research Facilities', and 'Utilities Council'. Further down are 'Core Metrics', 'Critical Facilities', and 'Energy Use Intensity'. At the bottom of the sidebar is a 'PAYMENT STATUS' section with links for 'Unpaid Pay My Bill' and 'Log Out'. The main content area has a section titled 'INSTRUCTIONS AND TIPS' with a sub-header 'Pages with reference documents will open in a new window.' Below this are several bullet points with links to various documents and reports, including 'Getting Started PDF', 'Guide to the Facility Issues website: PDF Video', 'Entering your data with online forms: PDF Video', 'Entering your data with Excel template: PDF Video', 'Other Benchmarking reference info: Webpage', 'Compendium of Facility Metrics & Measures PDF', 'Benchmarking Participant Agreement: Webpage', 'Guide to the Microsoft PowerBI report: PDF', 'Open the Report (PowerBI login using @facilityissues.net account or Open using your own PBI account)', and 'Getting value from your benchmarking report: Webpage'.

SURVEY(S) ENROLLED IN

- Facility Managers Roundtable
- Museums & Cultural Institutions
- Research Facilities
- Utilities Council

Core Metrics

Critical Facilities

Energy Use Intensity

PAYMENT STATUS

Unpaid [Pay My Bill](#) [Log Out](#)

INSTRUCTIONS AND TIPS

Pages with reference documents will open in a new window.

- Getting Started [PDF](#) – What's new in 2021? [PDF](#)
- Guide to the Facility Issues website: [PDF](#) [Video](#)
- Entering your data with online forms: [PDF](#) [Video](#)
- Entering your data with Excel template: [PDF](#) [Video](#)
- Other Benchmarking reference info: [Webpage](#)
- Compendium of Facility Metrics & Measures [PDF](#)
- Benchmarking Participant Agreement: [Webpage](#)
- Guide to the Microsoft PowerBI report: [PDF](#)
- [Open the Report](#) (PowerBI login using @facilityissues.net account or [Open using your own PBI account](#))
- Getting value from your benchmarking report: [Webpage](#)

5. Hover your mouse over the program you want to use, and you will see new links appear – click the “Go To Survey” link

The screenshot shows a hover menu for the 'Research Facilities' program. The menu contains three links: 'Go To Survey' (highlighted in red), 'Members Area', and 'Edit Properties'. A hand cursor is shown hovering over the 'Go To Survey' link.

Research Facilities

[Go To Survey](#) | [Members Area](#) | [Edit Properties](#)

Cost Survey Home Page – For Online Data Entry

(The main benchmarking program was traditionally called the cost survey)

6. The list of properties is the top left of the page. The survey form will show different survey sections for organization/department vs. property data based on the item selected on the top left.

“All Properties” is organization level data.

The screenshot shows the 'COST SURVEY' home page. On the left, under 'MY PROPERTIES', the 'All Properties' option is highlighted with an orange box. An orange arrow points from this box to the 'NEXT SECTION' button in the main content area. The main content area has a dark header with 'NEXT SECTION >' and a welcome message: 'Welcome to your cost survey. This online survey is an important part of the benchmarking process. It contains a series of questions that are designed to collect the data we need to assess trends and identify best practices for your group. The questions are divided into eight or nine sections, as shown in the'. On the right, there is a user greeting 'Welcome, Facility Test User' with a link 'Pay for your survey here', a progress bar at 30%, and a 'SURVEY LINKS' section with links to Organization Info, Facility Services, Best Practices, Performance Survey, Learning From Others, and Feedback. At the bottom right, it says 'MEMBERS ONLY'.

All the properties you benchmark are listed and can be selected

The screenshot shows the 'COST SURVEY' home page with 'Office Building' selected under 'MY PROPERTIES', highlighted with an orange box. An orange arrow points from this box to the 'NEXT SECTION >' button in the main content area. The main content area has a dark header with '< PREVIOUS SECTION' and 'NEXT SECTION >'. Below the header, it says 'Section F: Property Info » Property Demographics'. The 'Purpose' section states: 'Purpose: In this section, you will define your properties and classify them by type and other attributes that can be used to filter the reports.' There is a checkbox labeled 'Check here if the following section does not apply to you.' and a link 'expand all | collapse all'. On the right, there is a user greeting 'Welcome, Facility Test User' with a link 'Pay for your survey here', a progress bar at 22%, and a 'SURVEY LINKS' section with links to Property Info, Property Demographics, Property Areas, Occupancy and Use, Property Operating Expenses, and Utility Consumption / Waste. At the bottom right, it says 'MEMBERS ONLY'.

Data Entry With Online Forms

7. The survey forms are self-explanatory.



COST SURVEY
Section A: Organization Info » Organization Demographics



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](#)

ABOUT YOUR ORGANIZATION

Organization name and address:  

Type of organization: *  

Ok to share your name? 

 3-6 character acronym to use in the report 

SURVEY LINKS

- ▼ Organization Info
 - Organization Demographics
 - Staffing Info
 - Overall Budgets
 - Technology Used
- ▶ Facility Services
- ▶ Best Practices
- ▶ Performance Survey
- ▶ Learning From Others
- ▶ Feedback

Survey forms are grouped by section – click heading to open/close list, click section to load the form

Click the small blue “i” for information about the data to be entered

As you enter data, there will be a little green check as it is saved (short lag)

Cost Survey Home Page – For Excel Template

(The main benchmarking program was traditionally called the cost survey)

6. If you wish to delete a property, use the icon on the list of properties is the top left of the page..
7. Download and upload data with the Excel template by using the buttons on the left.

Delete property here

Click Create Excel File button, wait a minute and then click file link to download template

Click Browse to select completed data file and click Upload. Wait until you see green bar on top of page (success) or error message

The screenshot shows the 'COST SURVEY:' home page. On the left, under 'MY PROPERTIES', there is a list of properties: 'Organization Info', 'GALLERY - Exhibition C...', 'OFFICE - Office and E...', 'HOME - Historic res...', and 'EVENT - New Wing'. Each property has a trash icon to its right. An orange arrow points from the 'Delete property here' text to the trash icon next to 'OFFICE - Office and E...'. Below the list is an 'Add Property' button. Further down, there are two sections: 'DOWNLOAD AN EXCEL COPY OF YOUR COST SURVEY DATA' with a 'Create Excel File' button, and 'UPLOAD AN EXCEL FILE OF YOUR COST SURVEY DATA' with a 'Browse...' button and an 'Upload' button. An orange arrow points from the 'Click Create Excel File button...' text to the 'Create Excel File' button. Another orange arrow points from the 'Click Browse to select...' text to the 'Browse...' button. Below the 'Upload' button, it says 'Your Upload file: -' with a trash icon. On the right side of the page, there is a 'Welcome to your cost s' header and a paragraph of text: 'This online survey is an i', 'It contains a series of que', 'we need to assess trends', 'The questions are divided', and 'navigation area to the left'. Below this is a bulleted list: '• You may complete th', '• Each time you comp', 'appear to indicate th', and 'to click any other bu'.

Using the Data Template

When first opening, you may need to enable editing or manually recalculate the sheet for data to display (check the site code and email to confirm)

AutoSave Off FI-FM_rf_export_2019_04_30.xlsx - Protected View - Excel

File Home Insert Draw Page Layout Formulas Data Review View Developer Add-ins Help Power Pivot Tell me what you want

PROTECTED VIEW Be careful—files from the Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View. [Enable Editing](#)

E16

	A	B	C	D	E	F	G
1	FM BENCHMARKING SURVEY						
2	DATA TEMPLATE						
3	This survey data template is provided to help you collect and organize your data for the Facility Issues Benchmarking program. You are free to share copies with others inside your organization who are providing or use the data, but copies are not allowed to be shared with persons outside your organization. (Facility Issues © 2019 - for Participants' Internal use only)						
4	Use these worksheets to collect and organize your data. See the "New This Year" Tab for more information.						
5	IMPORTANT: Review the table below and select YES for those items that you wish to upload - data from this file will replace that entire section (and only that section) in the system.						
6	Section						
7	Site code assigned by Facility Issues; for information only.		0				
8	Contact person's email - edits must be made on Facility Issues website.		0				
9	ORGANIZATION INFORMATION		Import This Section?	Section Reviewed			

NOTE: If you do not see your site code in cell C8 below after downloading data (or if it is showing 0), then press <Ctrl> + <Alt> + F9 keys.

ish to upload - data from this file

F099	
rlambe@facilityissue	
Import This Section?	Section Reviewed

Excel Template – Instructions Tab

The Instructions sheet shows status of data for this file, lets you track data “assignments” and identifies sections to upload

DATA TEMPLATE
This survey data template is provided to help you collect and organize your data for the Facility Issues Benchmarking program. You are free to share copies with others inside your organization who are providing or use the data, but copies are not allowed to be shared with persons outside your organization. (Facility Issues © 2019 -)

...eets to collect and organize your data. See the "New This Year" Tab for more information.

...view the table below and select YES for those items that you wish to upload - data from this file ...entire section (and only that section) in the system.

List of all the available sections (tabs) with hyperlink to that section

“Guides” show approximate completion by section

	Import This Section?	Section Reviewed	Percent Completed	Use this column to track who completes each section
ORGANIZATION INFORMATION				
A Section A: Organization Info >> Organization Demographics (Required)	No	Yes	37%	
B Section B: Organization Info >> Staffing	No	No	27%	
C Section C: Organization Info >> Budget	No	No	75%	
D Section D: Organization Info >> Technology Used	No	No	64%	
PROPERTY INFORMATION				
Property Info >> Definitions (For Sections F-K)	Definitions Only		# Properties: 5	
F Section F: Property Info >> Demographics (Required)	Yes		69%	
G Section G: Property Info >> Areas	No		367%	
H Section H: Property Info >> Occupancy and Use	No		36%	
I Section I: Property Info >> Operating Costs	No		38%	
K Section K: Property Info >> Utility Use and Waste	No		31%	
FACILITY PRACTICES				
JB Section JB: Facility Practices >> Janitorial Best Practices	No	Yes	100%	
MB Section MB: Facility Practices >> Maintenance Best Practices	No	Yes	100%	
SB Section SB: Facility Practices >> Space Management Best Practices	No	Yes	100%	
UB Section UB: Facility Practices >> Utility Best Practices	No	Yes	100%	

Select “Yes” for sections to upload

INSTRUCTIONS New This Year A-Demographics B-Staffing C-Budget D-Tech Property Info I ...

Excel Template – Organization/Department Tab

Single column for data with definitions adjacent.

Survey topic/question, the units and description of the data to enter.

Link to return to contents tab

[Return to Table of Contents](#)

Section A: Organization Info >> Organization Demographics (Required)

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.

ID	Topic / Question	Your Answer/Data	Units	Clarification
	Have you reviewed the following data for accuracy?	Yes	List	Prior year's data may have been pre-filled and should be confirmed.
ABOUT YOUR ORGANIZATION				
ORG_NAME	Organization name and address	Example Research	Text	Used for administration only.
ORG_TYPE	Type of organization	Research-Non-Profit	List	Select the one category that best describes the primary industry/focus of your organization.
ORG_SHARE	Ok to share your name?	OK to share our sitecode with others in the group who share theirs	List	Are you willing to share your sitecode with others in the group? Used for administration only
ORG_ID	3-6 character acronym to use in the report		Text	This will be the label used on the charts instead of a sitecode if you are willing to be identified. Leave blank for default sitecode.
FM_ORG	Where does the facility management organization report?	Operations	List	Select the best match of the top level executive who's organization includes facilities management (and facility projects /other services reported in this benchmarking survey).
FM_STAFFED	Facility Management Staffing Approach	Outsourced, all but a few key staff.	List	Select the option that best matches the approach for how you staff your facility maintenance and operations group.
UNITS OF MEASURE				
UNITS	Un	English Units	List	English units = square feet, acres, gallons, degrees F, etc.; Metric units = square meters, hectares, liters, degrees Celsius

Enter your data

Excel Template – Property Data Tab

Table with row for each Property – how you organize them is up to you. Definitions in a separate tab.

Links to contents tab
and data definitions

Survey topic/questions
and units for the data
to enter.

[Return to Table of Contents](#)

[See Definitions](#)

Section 5: Property Info >> Demographics (Required)

[Return to Table of Contents](#)

[See Definitions](#)

All define your properties by facility or by any grouping you wish (section of a building, individual building, group of buildings, etc.) type and other attributes that can be used to filter the reports. Sections G-K will use the same properties for space, cost, occupancy, property info definitions tab for clarifications of data fields. You can edit any field and copy/paste (NOT CUT/paste) data from other change rows 1-8. Most of the fields in this tab have defined selection lists.

PROPERTY IDENTIFICATION								
Property ID	Property Name*	Property Address*	Property Location - Postal code*	Include in Benchmarking*	Number of Days in Service*	Property Nature	Property Setting	Property Type
BLDGID	BLDGNAME	PROP_ADDR	PROP_POSTAL	PROP_INCLUDE	PROP_DAYS	PROP_NAT	PROP_SET	PROP_TYPE
Text	Text	Text	Text	List	Days	List	List	List
OFF	Office Building		13403	Yes	365	Stand alone or single building	Suburban Area	Office/General Admin
LAB	Lab		13403	Yes	365	Multiple buildings grouped together	Suburban Area	Laboratory
SHOP	Shop			Yes	300	Stand alone or single building	Suburban Area	Light Industrial/Shops
CENTER	Central Meeting			No				
ANNEX	Office Annex		13403	Yes	50	A space within a building	Suburban Area	Office/General Admin

Enter your data by row – can use all normal Excel formulas, lookups, and copy/paste from other sheets – NO CUT/PASTE!

Property Info Definitions | **F-Property Demographics** | G-Property Areas | H-Property Occupancy

Property IDs –
SAME ORDER
on all sheets

Enter your data by row – can use all normal Excel formulas, lookups, and copy/paste from other sheets – NO CUT/PASTE!

Clarifications for property data fields

Excel Template – Some Details

ID	Topic / Question	Your Answer	Units	Clarification
OX_F_INSU	General Property Insurance		Curr	Include property and casualty insurance costs for amounts paid or charged to budget.
OX_I_TECH	The cost of all your property-specific information systems		Curr	Include subscriptions, license fees, use fees, tech use/maintenance of all property-specific system BMS, EMS, mass notification, smart tracking system acquisition, user training, staff, and contractor; other sections of the survey such as maintenance
CX_TECH	The setup cost of all your property-specific information systems.		Curr	Include all "one-time" costs associated with new above. Include cost of initial data acquisition or not report this cost in other sections of the survey improvements.
CAPITAL INVESTMENT				
CX_BLDG	Capital Renewal *		Curr	All expenditures over and above those in your m required to keep the facilities in reliable operation includes all 1-for-1 replacements but not significant costs for building and building services only.
CX_IMPRV	Capital Improvements		Curr	All expenditures the change the size or function benchmarking survey; include additional stacks/densification projects, and
CX_SITE	Site Capital Renewal *		Curr	All expenditures over and above required to keep the site (pavement operating condition for the present
CX_IMPR_SITE	Site Capital Improvements		Curr	All expenditures the change the a utility mains); include reconfiguration development.
TOTAL COSTS				
Include all expenses incurred in				
including exhibitions, education, recreation				

Template/data items new this year

"Core" or important data items

Optional data items

		Field ID	Data Range	Bldg ID
F	Section F: Property Info >> Demographics (Required)	DemogFields	DemogData	DemogRows
G	Section G: Property Info >> Areas	AreaFields	AreaData	AreaRows
H	Section H: Property Info >> Space Types	SpaceFields	SpaceData	SpaceRows
I	Section I: Property Info >> Occupancy and Use	OccupFields	OccupData	OccupRows
J	Section J: Property Info >> Operating Expenses	OpexFields	OpexData	OpexRows
K	Section K: Property Info >> Utilities	UtilFields/Bldg	UtilData/Bldg	UtilRows/Bldg
L	Section L: Property Info >> Assets	AssetFields	AssetData	AssetRows
M	Section M: Property Info >> Work Orders	WoFields	WoData	WoRows

Named ranges to let you reference external files more easily

Named ranges to let you reference external files more easily.

Questions, Problems, or Suggestions?

Robert Lambe, CFM, ProFM

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