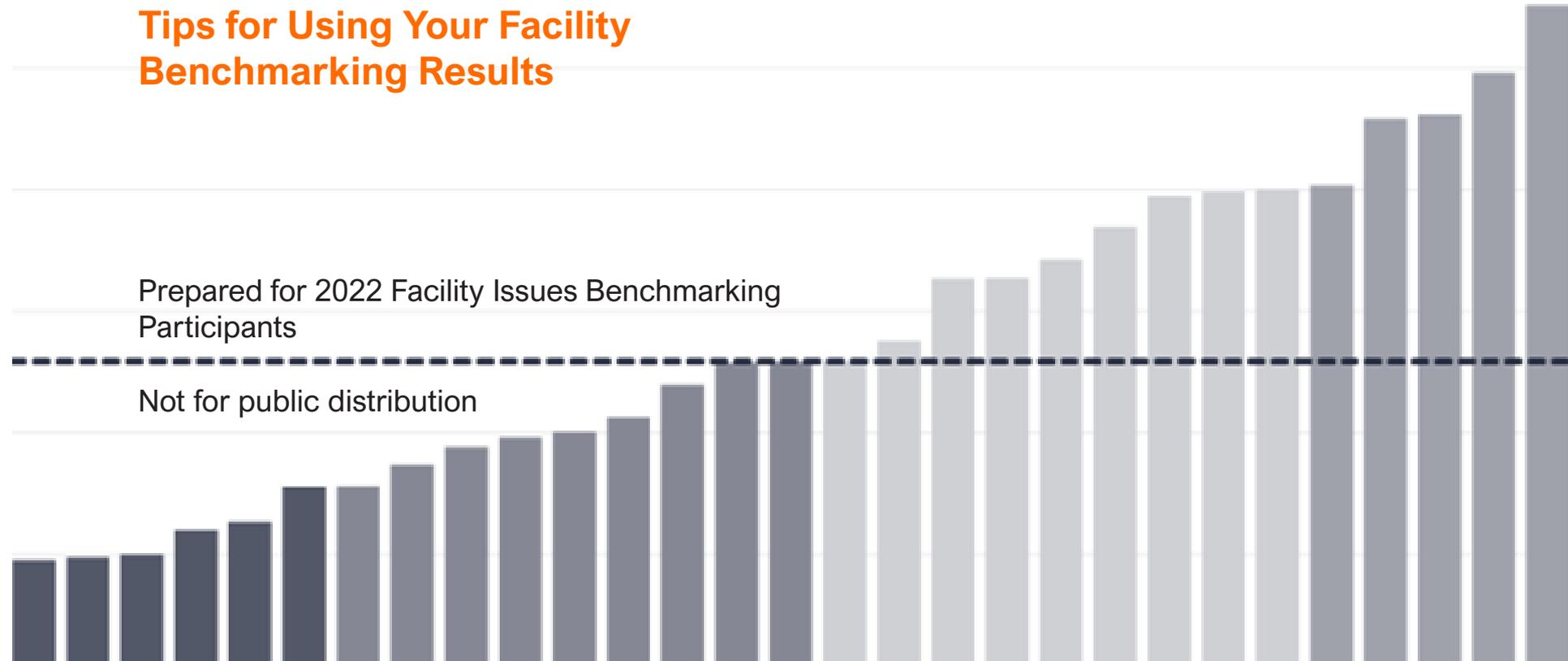# FACILITY ISSUES

Facility Benchmarking

Tips for Using Your Facility Benchmarking Results

Prepared for 2022 Facility Issues Benchmarking Participants

Not for public distribution

Contents

- Other References
- Brief Recap of Benchmarking Process / Objectives
- Suggested Process to Review Results
- Drafting Action Plan
- Additional Q&A

Other Sessions on the "Mechanics" of Benchmarking

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Facility Benchmarking

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

Prepared for 2022 Facility Issues Benchmarking Participants

Not for public distribution

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Facility Benchmarking

Guide to the Facility Benchmarking Reporting

Prepared for 2022 Facility Issues Benchmarking Participants

Not for public distribution

Download: Get Value from the Benchmarking Process:
https://sandbox.facilityissues.com/facility-benchmarking-process/

The Facility Benchmarking Process

This discussion will address the few steps in the benchmarking process.
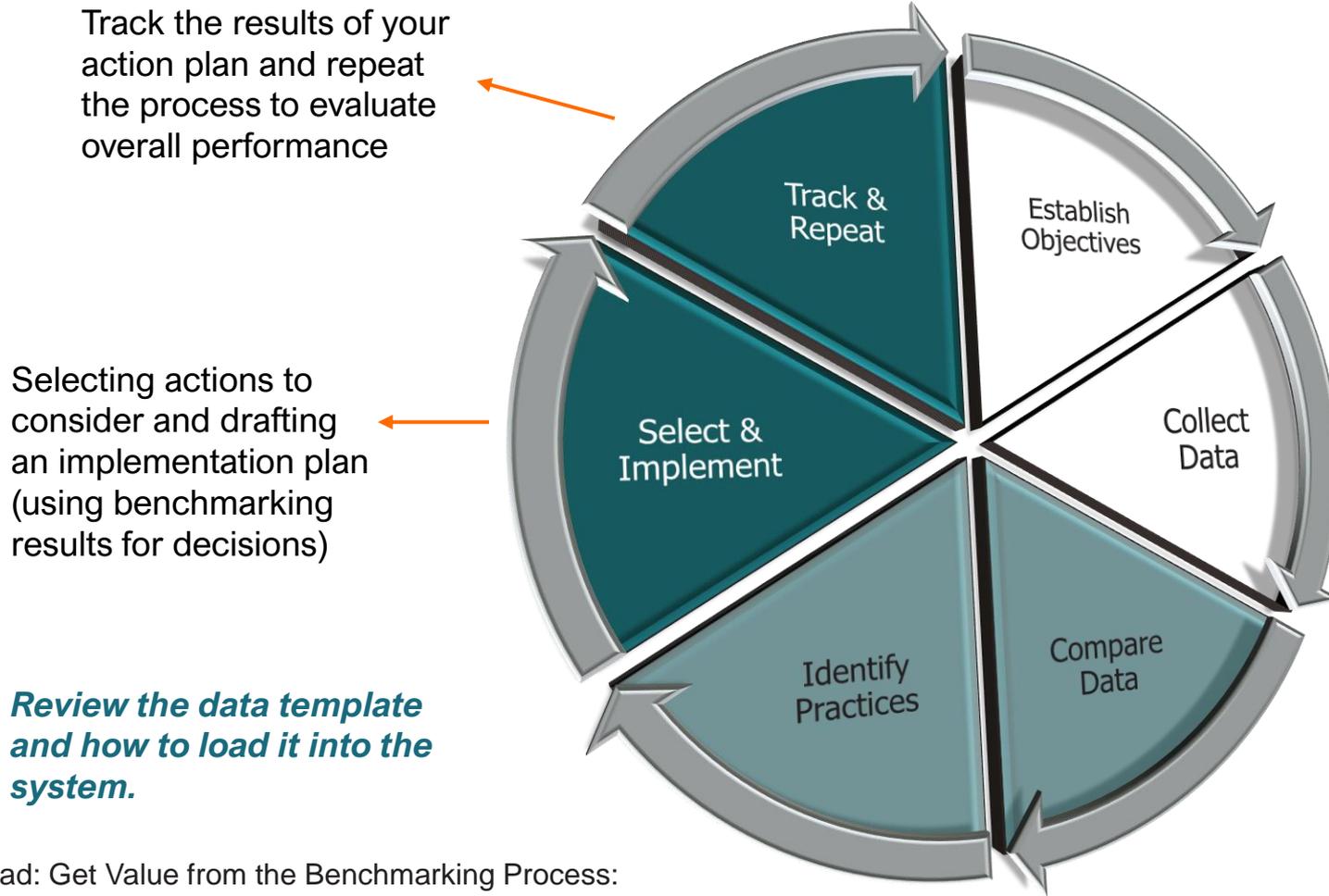
Track the results of your action plan and repeat the process to evaluate overall performance

Selecting actions to consider and drafting an implementation plan (using benchmarking results for decisions)

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

Download: Get Value from the Benchmarking Process:
https://sandbox.facilityissues.com/facility-benchmarking-process/

Use your benchmarking review/results as part of your facility planning and management activities.

Organization Mission

Facility Space & Assets

SLA

FM Organization

Property O&M Cost Performance

Property Environmental Performance

Org. xSG Performance

How do your standards compare?

How does your performance compare?

What actions are worth considering?

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Dimensions of Performance

- Asset Management
  - Condition
  - Reliability
- Cost
  - Capital
  - Custodial
  - Maintenance
  - Security
  - Total
  - Utilities
- Occupant Service
- Space & Occupancy
  - Effectiveness
  - Utilization
- Staffing
- Sustainability
  - Energy
  - GHG
  - Waste
  - Water

other...

Where do you want to stand on each of these?

- **Leader** – Have leading edge performance in this area based on quality, quantity, innovation, or impact.
  - Best in Class
- **Competitive** – Have performance that is consistent with others in the industry, prudent, responsible.
- **Not a Priority** – Not concerned with performance in this area (focused on other aspects).

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What are Your Organization's Priorities?

Performance Criteria	Performance Objectives		
Space quality & utilization	Best in class		
Space environmental quality		Responsible, competitive	
Facility reliability & resiliency			Track but not a Priority
Employee wellness & productivity	Leader		
Visitor wellness & experience	Leader		
Facility operating costs		Responsible, competitive	
Sustainability	Best in class		
Organization innovation			Track but not a Priority
FM staff expertise & engagement		Responsible, competitive	

Example

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Suggested Process to Evaluate Benchmarking Results

1. Understand Your Organizational Objectives

2. Review Your Performance *(Particularly vs. Your Objectives)*

3. Identify Potential Actions To Consider
   - Triage and Select / Recommend Actions

4. Communicate Results of Your Review
   - Report overall performance and recommendations to leadership.
   - Communicate key metrics with staff & reasons for any initiatives
   - Other as appropriate

5. Track Progress on Initiatives, and Trends in General
   - Monitor trends of key metrics to measure progress
   - Perform ad-hoc queries/review to respond to emerging issues/questions
   - Share lessons learned from your initiatives & learn from others

Review Percentiles for Overview of Your Performance

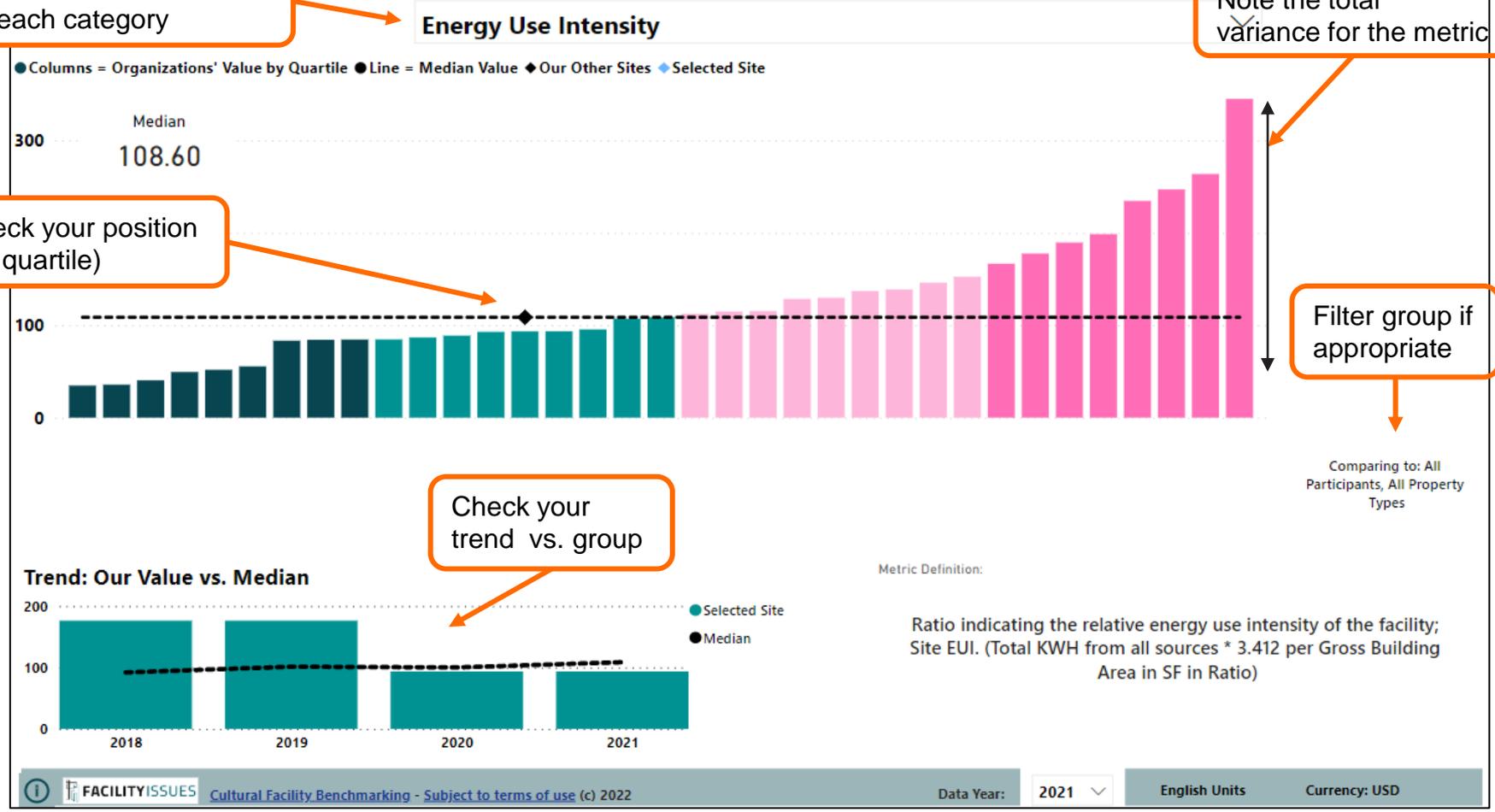# Review Quartile Charts to Identify Your Performance

Review metrics of interest for each category

Note the total variance for the metric

Check your position (by quartile)

Filter group if appropriate

Check your trend vs. group

Energy Use Intensity

● Columns = Organizations' Value by Quartile ● Line = Median Value ◆ Our Other Sites ◆ Selected Site

Median
108.60

300

100

0

Comparing to: All Participants, All Property Types

Trend: Our Value vs. Median

200

100

0

2018   2019   2020   2021

● Selected Site
● Median

Metric Definition:

Ratio indicating the relative energy use intensity of the facility; Site EUI. (Total KWH from all sources * 3.412 per Gross Building Area in SF in Ratio)

FACILITY ISSUES   Cultural Facility Benchmarking - Subject to terms of use (c) 2022

Data Year: 2021 ∨   English Units   Currency: USD

Compare Performance vs. Objectives → Action?

Want → Are ↓	Leader	Competitive	Not Priority
Leader	Document & Celebrate	Document & Celebrate	Evaluate Resource Allocation
Competitive	Incremental Improvements & Evaluate	Manage by Exception	Manage by Exception
Struggling	Evaluate Radical Changes	Incremental Improvements & Evaluate	Manage by Exception

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General Types of Actions

A. Document & Celebrate
- Validate data and performance, then document and share with leadership and stakeholders, publicly acknowledge contributors and have them share lessons learned.

B. Manage by Exception
- Practice benign neglect and save attention for when the performance or trend deteriorate; delegate these areas to grow staff capabilities.

C. Incremental Improvements & Evaluate
- Look for immediate incremental improvements (e.g. Lean approach; solicit ideas from staff and internal stakeholders; evaluate radical changes if insufficient progress.
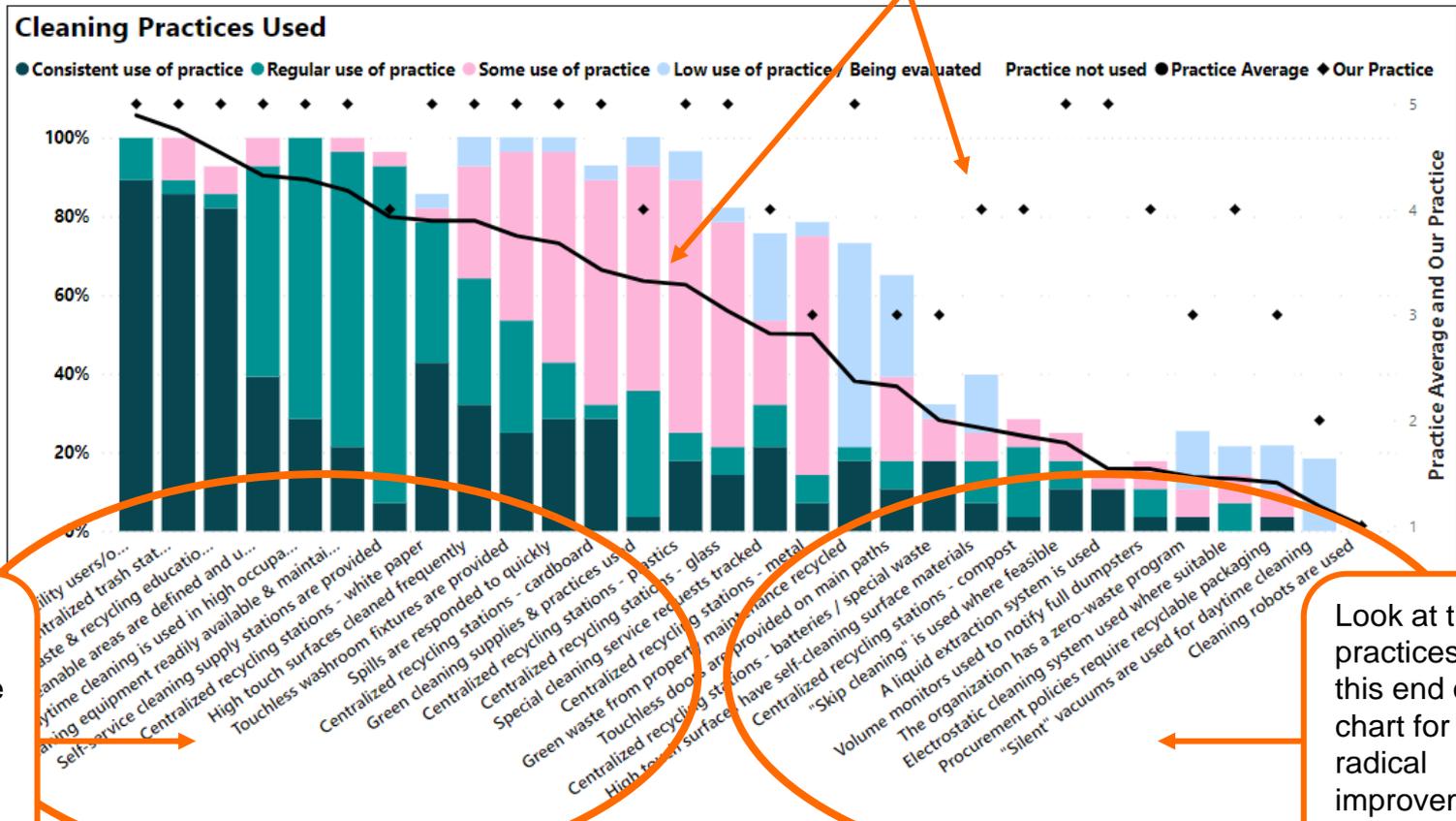
D. Evaluate Radical Changes
- Need to look at doing things significantly differently; look outside the organization and maybe hire a study.

E. Evaluate Resource Allocation
- Look at whether there are resources you can re-allocate to other areas.

Review Use of Practices for Potential Actions

Compare your use (black diamonds) vs the average use (black line) to see which practices/technology you might employ more.

Cleaning Practices Used

Legend: ● Consistent use of practice ● Regular use of practice ● Some use of practice ● Low use of practice ● Being evaluated ● Practice not used ● Practice Average ◆ Our Practice

Look at the practices at this end of the chart for quicker, incremental improvement options.

Look at the practices at this end of the chart for more radical improvement options.

Triage Your List of Potential Actions

Where do you need to act?

- Organization Priority

Where is there likely to be an ROI?

- Financial payback
- Accomplish some other department objective

What can be accomplished in reasonable time?

- Quickly
- Within your control / resources
- Break large programs into steps

Where might you want to revisit your standards / or objectives?

Suggest you select no more than 1-2 major changes actions or 3-5 smaller ones at a time.
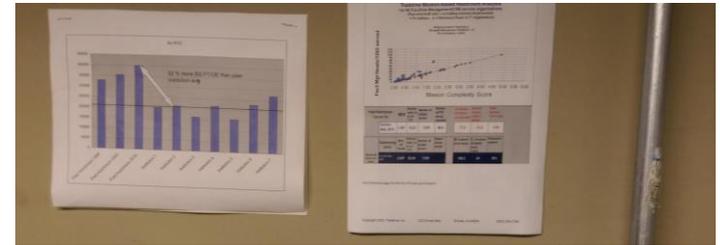
Communicate & Implement

Celebrate good results

- Post & publish annotated materials

Explain why action needed where results are not as good

Roll out "action plan"

- Obtain support
- Assign / solicit "champion"
- Maintain awareness & change management

Questions, Problems, or Suggestions?

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