

# ***IAMFA BENCHMARKING PRACTICES AND LEARNING WORKSHOP***



**The 33rd IAMFA Annual Conference  
Amsterdam, the Netherlands**

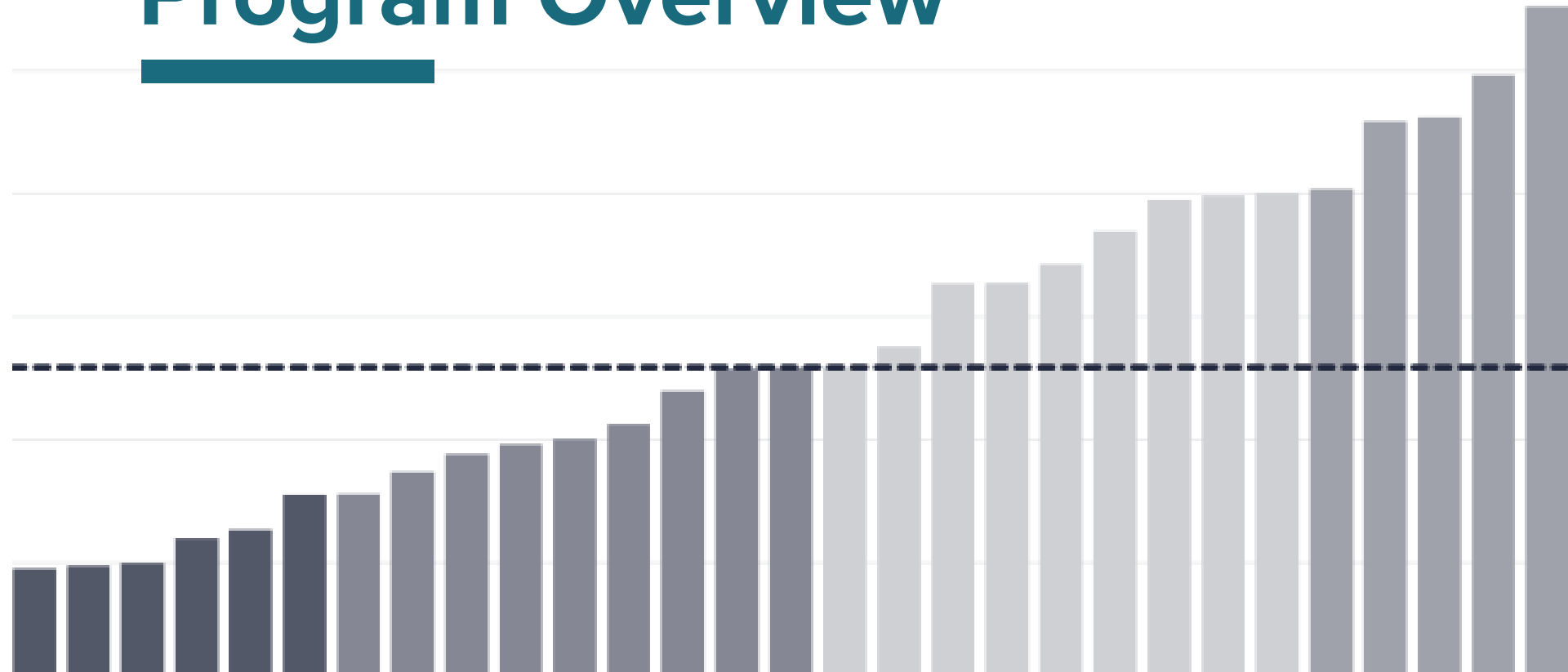
**10-14 September 2023**

## **Welcome!**

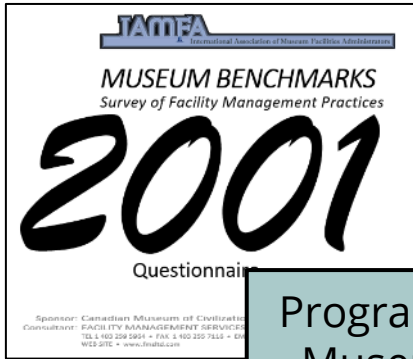
- This is a pre-meeting presentation to save time at the meeting (and maybe help you sleep on the plane). We will not review it at the meeting except for any questions or comments you may have.

# 2023 Cultural Facility Benchmarking Program Overview

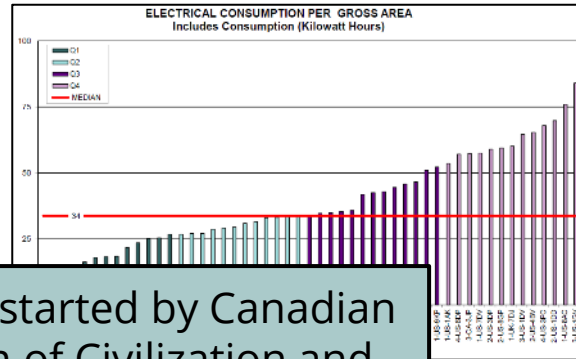
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# 22 Years of Cultural Facility Benchmarking



2001



2015



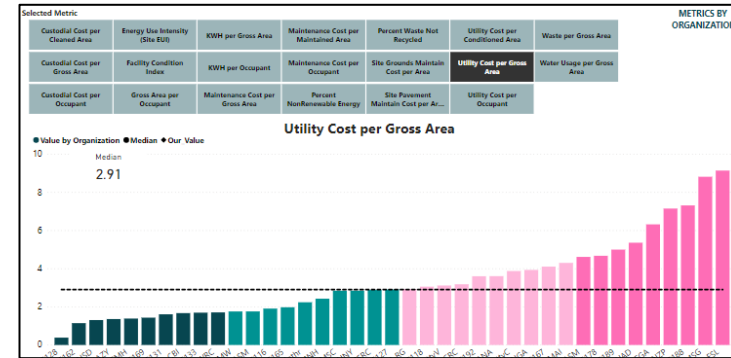
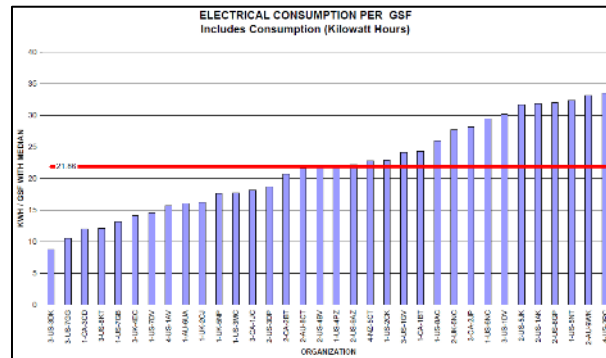
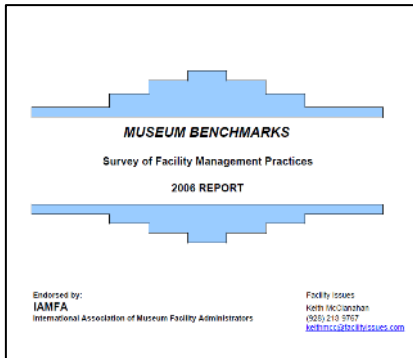
2020

Program started by Canadian Museum of Civilization and evolved from email/Word documents to Excel and now Power BI reporting.

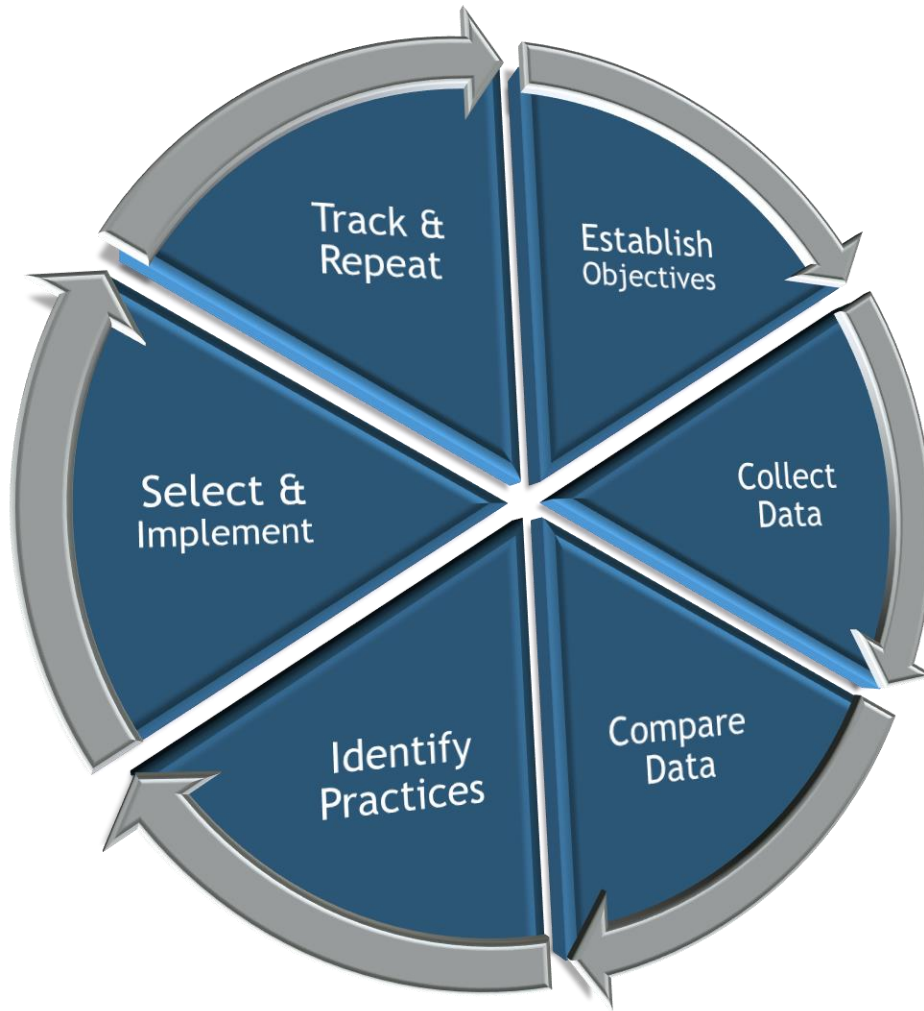
2005

2011

2018



# What Is Benchmarking – The Process



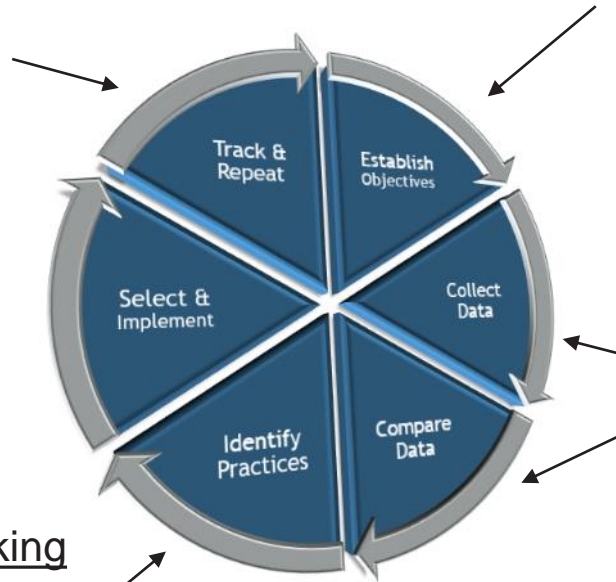
1. Establish/Clarify Your Objectives
2. Gather & Normalize Your Data
3. Compare with a Target or Peer Group
4. Identify Apparent “Best Practices”
5. Select Changes To Implement
6. Track Progress

Download at: <https://facilityissues.com/facility-benchmarking-process/>

# The Cultural Facility Benchmarking Activities

## General Support

- Technical support
- Data / metrics whitepapers
- Ad-hoc questions
- Tips on how to use results
- Ongoing annual program with trend data



## Steering Committee

- ~ Monthly calls to identify:
- Metrics of interest
  - Report changes
  - Meeting topics

## Data & Metrics

- 360° facility related metrics
- Templates to collect / enter data
- Interactive Power BI Reporting

## Shared Practices & Networking

- Benchmarking include practices and technology
- ~ Monthly Shared Practice Virtual Meetings on emerging issues, topics of interest, & networking
- Annual “Workshop”

## Available:

- Custom Power Query templates to streamline data assembly from your sources
- Staff training options

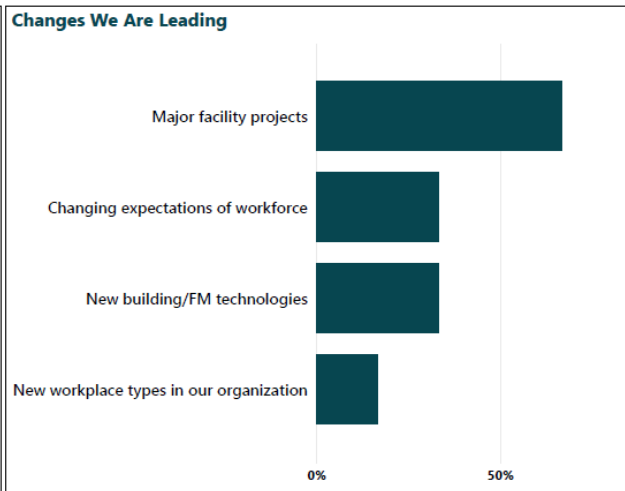
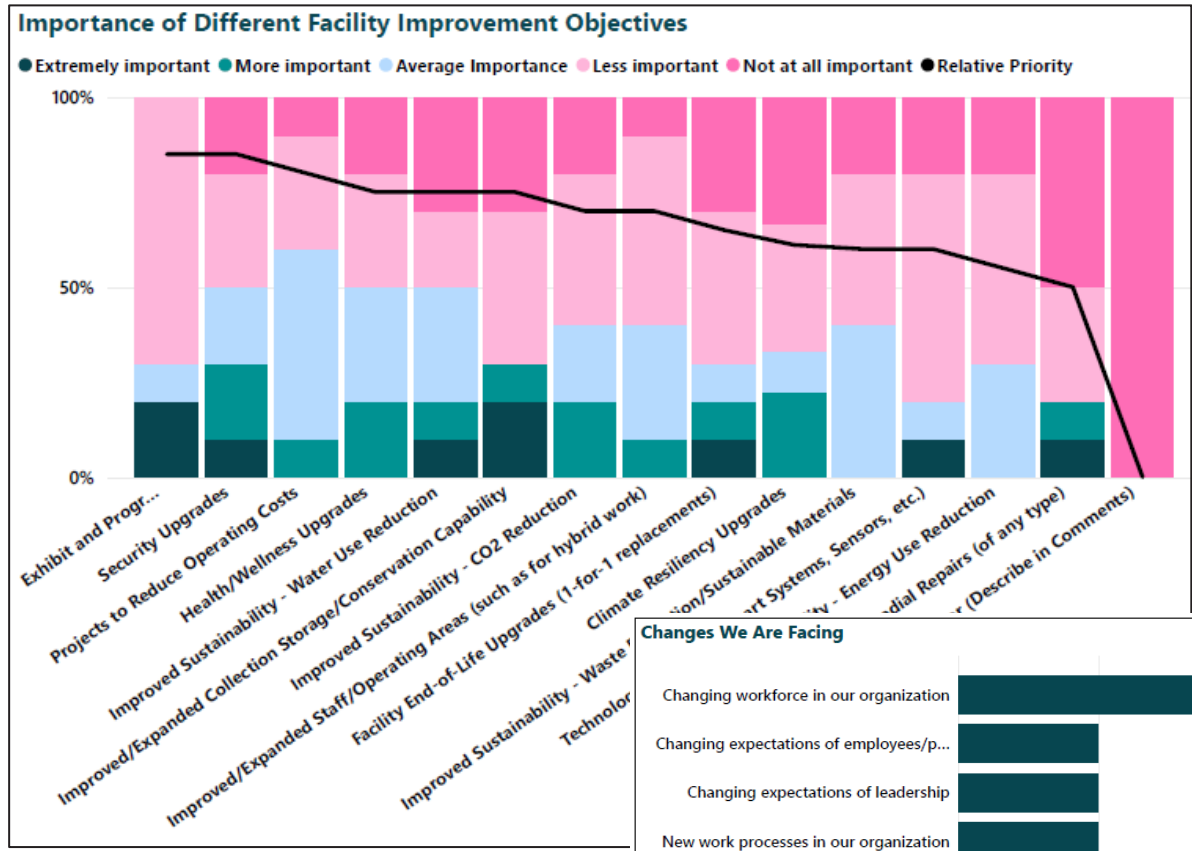
More Info: <https://facilityissues.com/cultural/>

# Monthly Shared Practices & Networking Meetings / Surveys

2023 Monthly Shared Practice & Networking Topics	
<b>Jan</b>	Identify Emerging Topics of Interest
<b>Feb</b>	FM Performance Metrics (& Systems used)
<b>Mar</b>	Leading the Transformation – Tips on Change Management
<b>Apr</b>	Communicating Value and Valuing Communication
<b>May</b>	Case Study: Disaster and Resilience: Navigating the Aftermath of the Ida Flood at Brandywine Conservancy & Museum of Art
<b>Jun</b>	Cultural Facility Sustainability Plan Development Progress at the Clark and Glenstone
<b>Jul</b>	Work Order Setup and Reporting
<b>Aug</b>	Case Study: Sustainability Action Plan for the Hofburg Innsbruck Museum, Austria
<b>Oct</b>	Annual Workshop Town Hall Session
<b>Nov</b>	Discussion of Emerging Issues



# Example Shared Practice Survey Results





# Metrics Reports & Categories

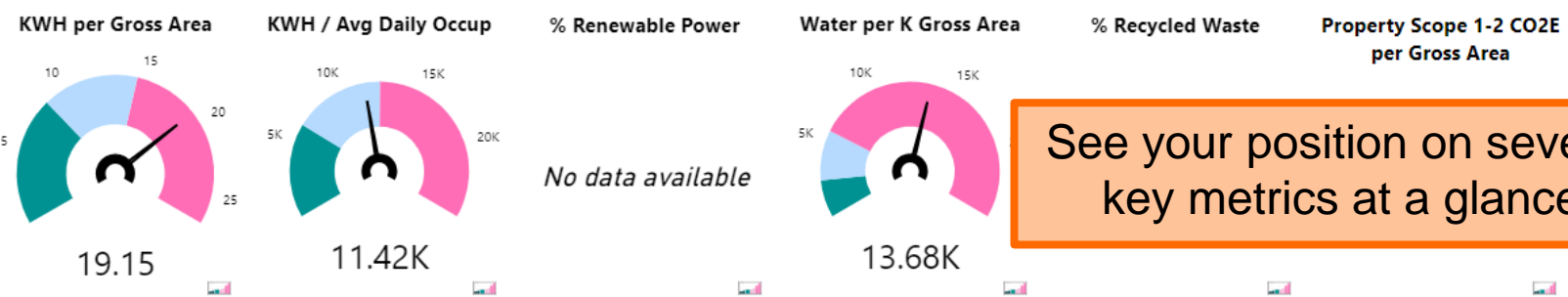
Reports	Metric Categories
<p><b>Property Assets &amp; Space Metrics</b> Reporting on the space and asset related metrics; gross areas, net areas, facility condition index, capital renewal, and some occupancy metrics.</p>	<p>Asset Management Space &amp; Occupancy</p>
<p><b>Property O&amp;M Cost Metrics</b> Reporting on the traditional facility operating cost metrics, maintenance, cleaning, grounds, security, and utilities.</p>	<p>Cost: Custodial Cost: Maintenance Cost: Security Cost: Total O&amp;M Cost: Utilities</p>
<p><b>Property Sustainability Metrics</b> Reporting on energy, water, waste, and CO2E metrics (Scope 1 &amp; 2 only).</p>	<p>Sustainability: Energy Sustainability: GHG Sustainability: Waste Sustainability: Water</p>
<p><b>FM Organization Metrics</b> Reporting on staffing ratios, service levels, &amp; work order metrics. (Also costs and GHG at the organization level)</p>	<p>Cost: Capital Cost: Total O&amp;M Occupant Service Staffing Sustainability: GHG</p>



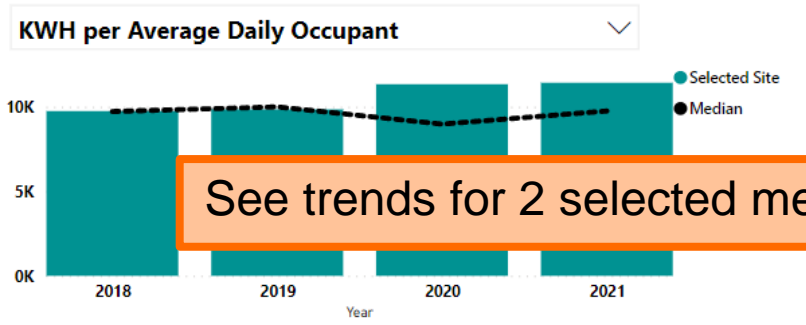
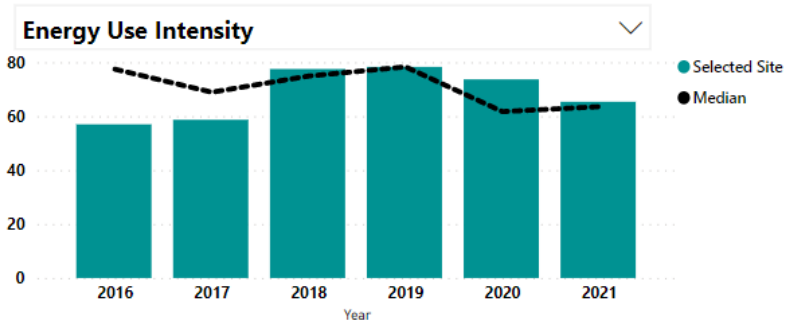
# Scorecard Page with Metrics at a Glance

Goal is to provide one page summary of performance by category.

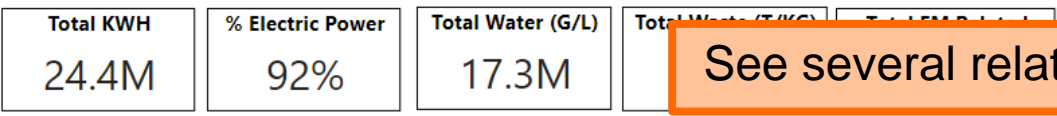
## Facility Sustainability Metrics Summary



See your position on several key metrics at a glance



See trends for 2 selected metrics

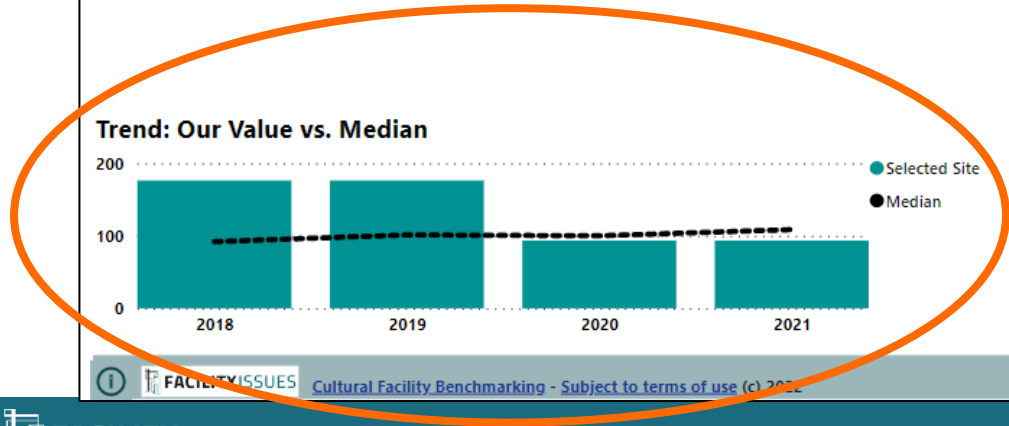
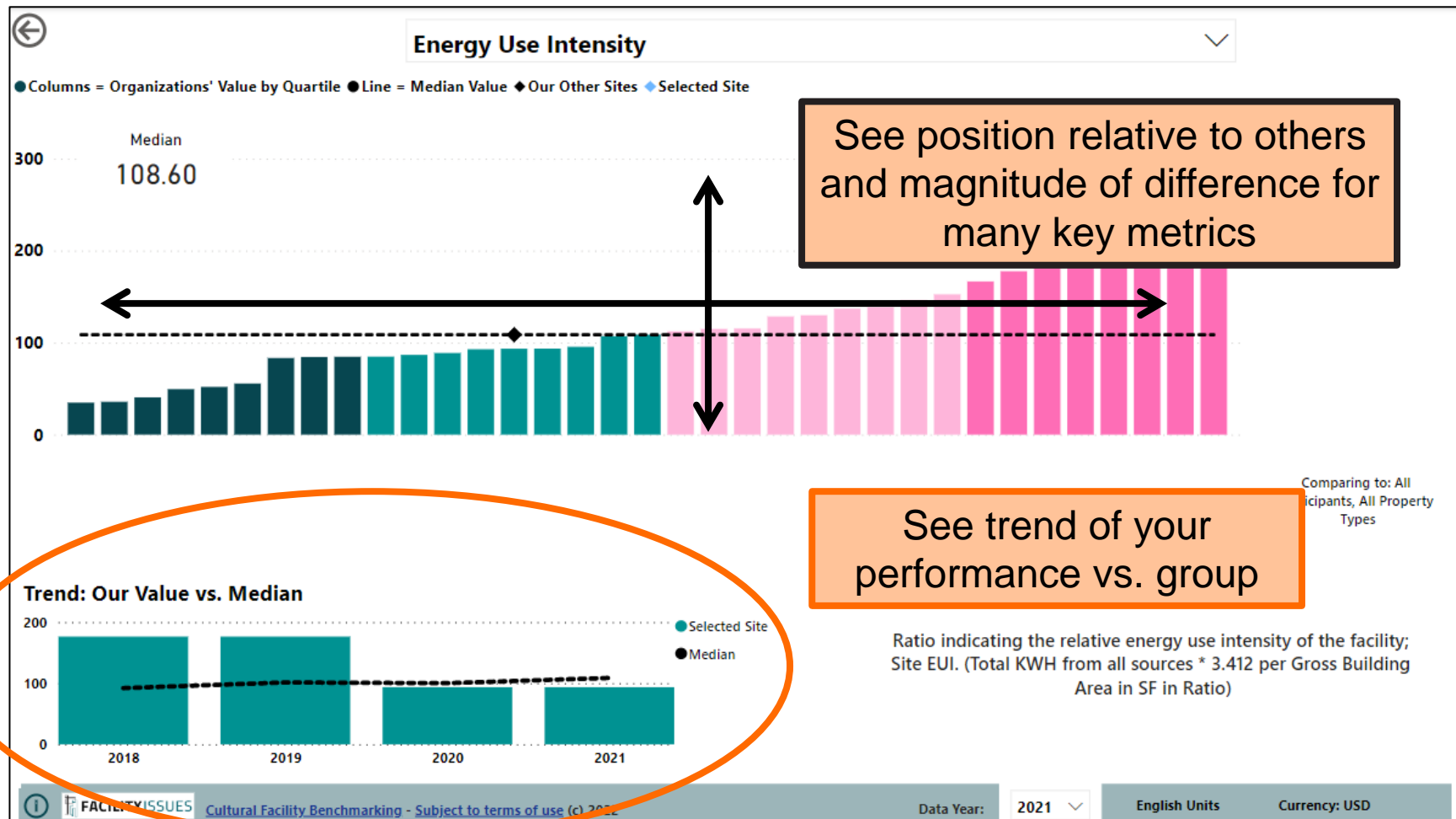


See several related facts

Comparing to: All Participants, All Property Types

# Benchmarking Reporting provides Context & Trends

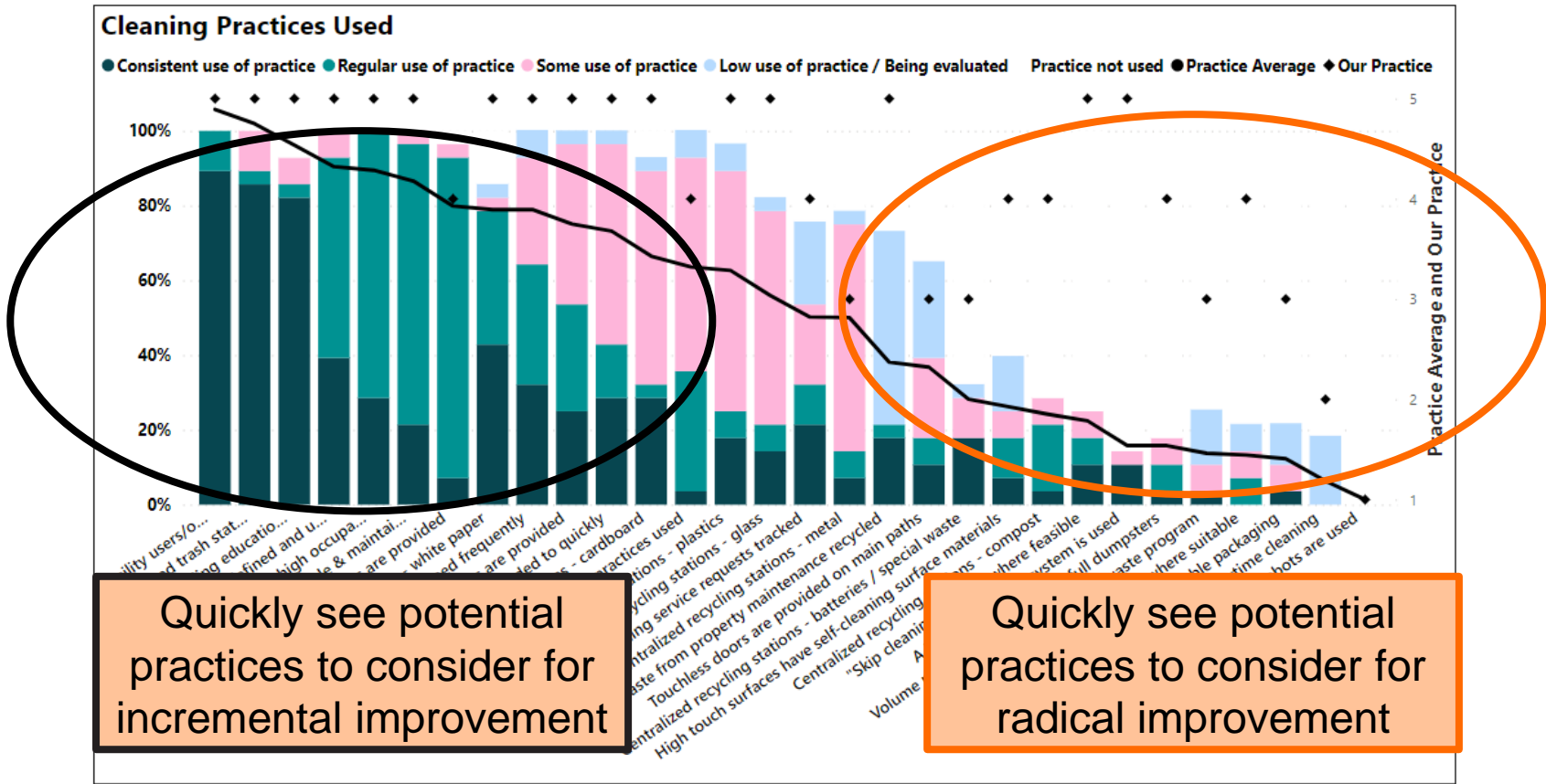
- Reporting: “Ready to share” with full range of facility-related metrics grouped on pages by topic.



# Compare Practices & Technology → Desired Change

Charts show degree of use for FM practices & technology by functional areas to help identify desirable change

- Cleaning, Maintenance, Space Mgmt., Utility Use/Sustainability





# New in 2022: GHG Metrics (Preliminary Data looks “Bumpy”)

Will evolve based on feedback.

## FM BENCHMARKING SURVEY

### WORKSHEET D: Organization Info >> Facility Related Greenhouse Gas

This worksheet is to calculate your non-property specific greenhouse gas for FM Operations. The two main categories here are department vehicles and furniture. This section contains the calculated results to copy/paste values into the benchmarking template - DO NOT CUT.

Fleet and Equipment Emissions				
ORG_USE_MR	Department Road Vehicles Included?	No	List	Select Yes if the fuel use for this type of vehicle is included in the figures on this sheet. Department Road Vehicles include any cars and trucks licensed for public road use.
ORG_USE_MN	Department Non-Road Vehicles Included?	No	List	Select Yes if the fuel use for this type of vehicle is included in the figures on this sheet. Department Non-Road Vehicles include any planes, boats, trains.
ORG_USE_ME	Department Equipment Included?	No	List	Select Yes if the fuel use for this type of vehicle is included in the figures on this sheet. Department Equipment includes construction equipment, lawn and garden equipment, and utility vehicles not included in Road Vehicles.
ORG_USE_MCO2	Mobile Combustion - CO2	-	MT	This is the amount of CO2 emissions associated with vehicle use for FM operations, all types of vehicles
ORG_USE_MCH4	Mobile Combustion - CH4	-	KG	This is the amount of CH4 emissions associated with vehicle use for FM operations, all types of vehicles
ORG_USE_MN2O	Mobile Combustion - N2O	-	KG	This is the amount of N2O emissions associated with vehicle use for FM operations, all types of vehicles
ORG_USE_MCO2E	Mobile Combustion - CO2e	-	MT	This is the amount of CO2e emissions associated with vehicle use for FM operations, all types of vehicles
Furtive Emissions				
ORG_USE_R	Refrigerant Release Included?	No	List	Select Yes if you have included the release of refrigerants; else select No and skip the of this section.
ORG_USE_RCO2	Refrigerant - CO2	-	MT	This is the amount of CO2 emissions associated with release of refrigerants.
ORG_USE_RCH4	Refrigerant - CH4	-	KG	This is the amount of CH4 emissions associated with release of refrigerants.
ORG_USE_RN2O	Refrigerant - N2O	-	KG	This is the amount of N2O emissions associated with release of refrigerants.
ORG_USE_RCO2E	Refrigerant- CO2e	-	MT	This is the amount of CO2e emissions associated with release of refrigerants.

FM Department Operations Scope 1 (vehicle combustion) & refrigerants

Property Scope 1 (combustion) and scope 2 (purchased power)

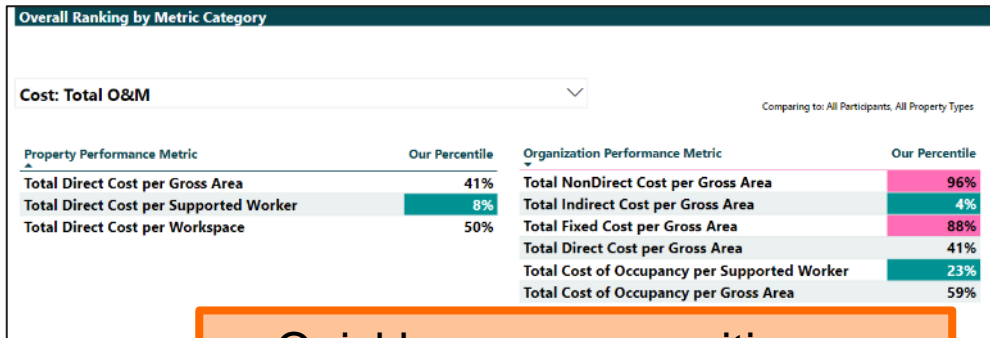
Purchased Electricity Consumption *	Purchased Natural Gas Consumption *	District Heating/ Cooling Energy Consumption	On-Site Renewable Energy Consumption	On-Site Generator Energy Consumption	Energy Consumption - All Other Fuels	Purchased (Green) RECs	Purchased Offset	Electric Grid for this Site	District Heating/ Cooling Fuel Source	On-site Generator Fuel Source	Other Fuel Source
USE_KWH_E	USE_KWH_G	USE_KWH_D	USE_KWH_R	USE_KWH_O	USE_KWH_F	USE_KWH_REC	USE_KWH_OFF	See Map	EDIT IF Fuel Source <> Nat'l Gas	Change as appropriate	List
KWH	KWH	KWH	KWH	KWH	KWH	KWH	MT	List	List	List	List
		2,000	2,000	2,000	2,000	2,000	2,000	US Average	Purchased Steam and Heat	Diesel	
								US Average	Purchased Steam and Heat	Diesel	



# New in 2022: Simple Results Calculator

Intent is quick and easy use of benchmarking data for:

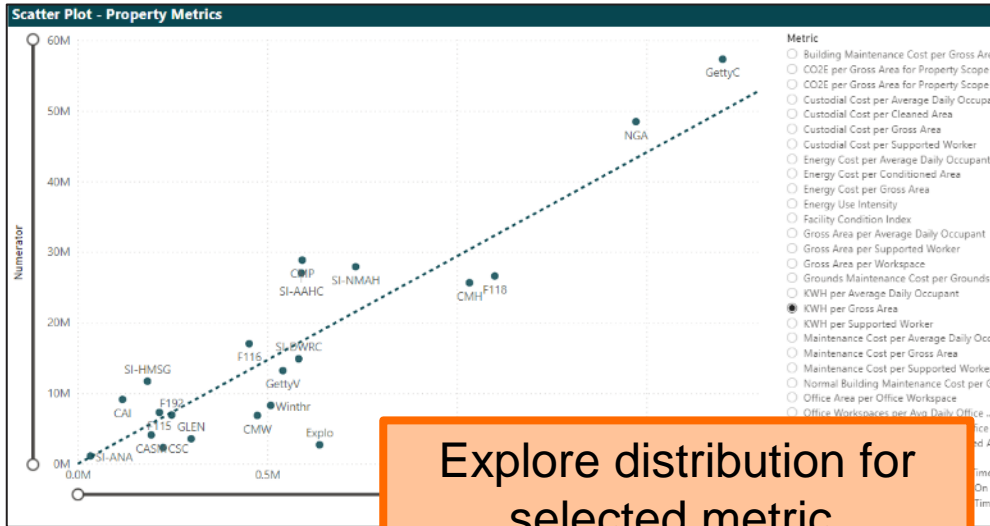
- How do we stand overall on key area of interest?
- What budget needed for additional space?



Quickly see your position on several metrics within topic area.

Also additional ways to use & explore the data:

- Export key metrics for use in interna reporting.
- Scatter plots to review variances in data.



Explore distribution for selected metric.

# List of 2023 Participants

- Anacostia Community Museum
- Art Institute of Chicago
- Canadian Aviation and Space Museum
- Canadian Museum of History
- Canadian Museum of Science and Technology
- Canadian War Museum
- Carnegie Museums of Pittsburgh
- Carnegie Science Center
- Collection Conservation Centre
- Exploratorium Pier 15
- Glenstone Foundation
- Hirshhorn Museum and Sculpture Garden
- National Gallery of Art
- National Museum of African American History and Culture
- National Museum of American History Behring Center
- National Portrait Gallery Donald W. Reynolds Center
- San Francisco Museum of Modern Art
- The Sterling and Francine Clark Art Institute
- The Getty Center
- The Getty Villa
- The National Arts Centre
- Winterthur Museum, Garden and Library

# Suggested Process to Evaluate Benchmarking Results

1. Understand Your Organizational Objectives
2. Review Your Performance (*Particularly vs. Your Objectives*)
  - Scan all metrics of interest
  - Focus on metrics / trends for your priority areas
3. Identify Potential Actions To Consider
  - Triage and select actions to pursue
  - Discuss lessons learned with colleagues
4. Communicate Results of Your Review
  - Report overall performance and recommendations to leadership.
  - Communicate key metrics with staff & reasons for any initiatives
5. Track Progress on Initiatives, and Trends in General
  - Monitor trends of key metrics to measure & report progress
  - Perform ad-hoc queries/review to respond to emerging issues/questions
  - Share lessons learned from your initiatives & learn from others

# Your Thoughts on 2023 (*Welcome Now & Later*)

How were shared practice meetings this year?

- Things you liked or did not like?
- What about the shared practice surveys?

How was benchmarking data process this year?

- Ease of process? Pain points?
- Usefulness of reporting? Gaps?
- Applicability of metrics? Metrics to clarify?

How is the (draft) benchmarking reporting this year?

- Ease of use?
- Usefulness?
- Alternative charts or formats to add to final?

Suggestions for 2024 (things to add or change)?

- Additional support needed on metrics/benchmarking?



# More Information



Presentations, handouts, and related downloads available at:

<https://facilityissues.com/articles/>



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