

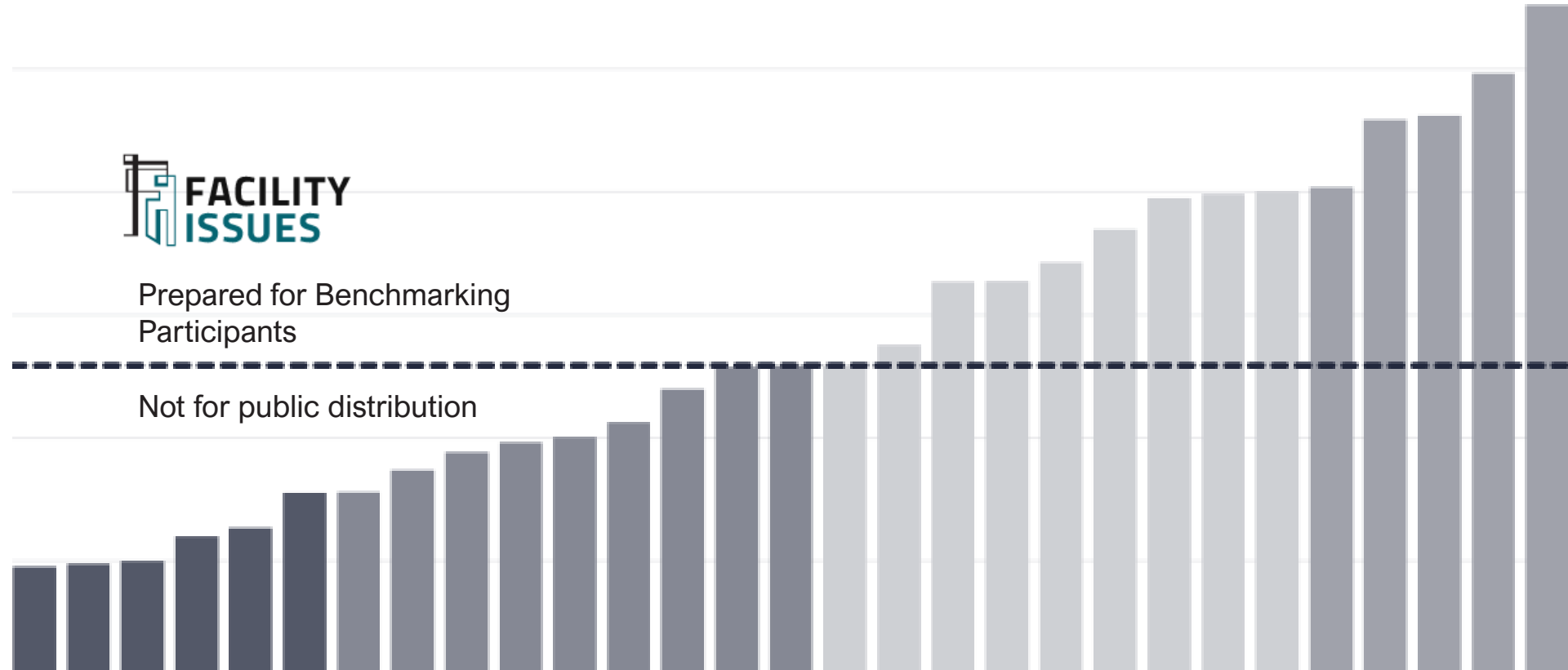
Benchmarking Program Reference Guide

Cultural Facility Benchmarking



Prepared for Benchmarking
Participants

Not for public distribution



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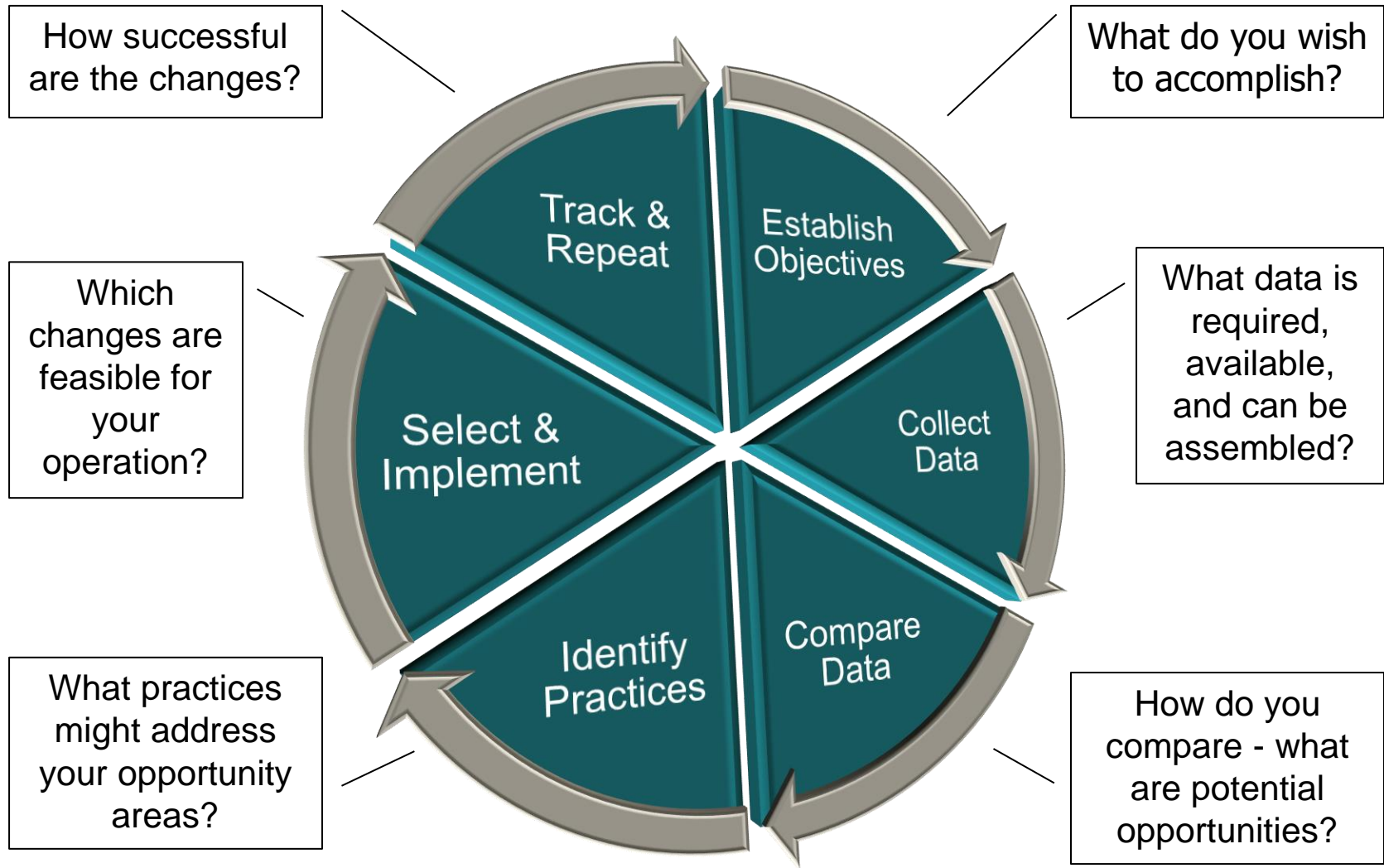
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The Benchmarking Process



VALUE OF FACILITY BENCHMARKING: <https://facilityissues.com/facility-benchmarking-process/>

About the Cultural Facility Benchmarking Program

Endorsed by IAMFA

- International participation
- All Cultural Institutions are welcome (recommend others join!)
- Program run by Facility Issues

Annual benchmarking program since 2001

- Benchmarking (Metrics Reporting)
 - Technical Support as needed
- Networking and Sharing
 - Shared Practice Meetings (~monthly on Zoom)
 - Best Practices Workshop (in-person day prior to annual conference)

Additional support / related services available from Facility Issues

- FM Metrics process setup within your organization
- Staff training / mentoring
- Special studies / assignments

For more info, visit: <https://facilityissues.com/cultural/>

Code of Conduct

All benchmarking participants are expected to adhere to a professional code of conduct, as required in the terms of agreement.

<https://facilityissues.com/link/conduct/>



Participating organizations agree to the following General Code of Conduct

- Conduct yourself professionally within legal bounds
- Participate by exchanging accurate information
- Respect the confidentiality of other's information

Benchmarking Participant Agreement

All benchmarking "participants" (anyone submitting data or with access to reports) agree to abide by these terms of use as a condition of their participation in the program(s). These requirements are to ensure that all participants can obtain the highest value from this program while protecting the business confidentiality of their information. The term "reports" used below means all data in all formats.

1. **Ownership:** The source data is the property of the entity submitting it. No participant shall distribute the information of another participant to any third party without written permission from the data owner. Reports and other derivative works are the property of Facility Issues.
2. **Confidentiality:** The information contained in the reports shall be considered confidential by all participants and shall not be publicly published or shared in any form except as specifically allowed under this agreement. **No participant shall release or disclose any information that allows identification of another participant's data.** Any participant code list shall not be shared.
3. **Internal Use:** Participants have unrestricted use of the reports within their organization for their own business. If posted to a location accessible over a network within the organization, access must be restricted to users aware of and bound by these terms of use.
4. **External Use:** Participants can use edited excerpts of the report as they wish in reports to their clients, customers, donors, oversight boards, regulators, or other third parties provided that any information furnished may only show identifying information for properties/organization for which the participant is the data owner and appropriate attribution. Use of selected information in professional association presentations is subject to review and approval by

Typical Schedule of Activities

Benchmarking Milestones

- Steering Committee, 2nd Tuesday of the month
- Late Jan / Early Feb - Renewal Notice or Sign-up Welcome
- ~Apr 1 – Getting Started, Data Entry
- ~ Jul 1 – Draft Report available, Data Entry continues
- Late Sep / Mid Oct – Final Report
- November – Report Review Meeting

Shared Practice Meetings

- Monthly, 4th Tuesday of the month
- Annual Workshop – Day before Annual IAMFA Conference

Schedule: <https://facilityissues.com/cultural/schedule/>

Participating in the Metrics Benchmarking & Reporting

- Designate a lead (primary contact) for your account:
 - Will receive all the benchmarking communications and account administrative information
 - An alternative contact is recommended and will also receive the communications
 - (The “roles” are explained on the next page)
- Coordinate data collection and entry
- Participate in shared practice meetings
- Coordinate in-person meeting attendance
- Share results within your organization
- Participate in steering committee meetings to help shape program

Benchmarking Program Roles

Lead

Primary Contact

- Manage benchmarking account
- Coordinate organization's benchmarking activities
- Keep others in organization informed of program activities and terms
- Arrange for support as needed
- Automatically receives all benchmarking communications

Alternate

Other Contact(s)

- Backup for Primary Contact
- Sometimes the person responsible for providing or entering data
- Sometimes the person responsible for review of benchmarking results
- Automatically receives all benchmarking communications

Associate

Everyone else in the organization

- Can participate in any shared practice meeting or shared practice survey
- Can use benchmarking results within the organization
- Need to subscribe to the email list to get meeting notifications and updates:


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

Your Facility Issues Accounts

Your organization's primary contact receives your account info as shown to the right

- Use THIS account to enter your data (also to access all the how-to guides)
- Use THIS account for the results reporting

Advise Facility Issues of any changes in contacts.



Last Updated 1/11/24

Facility Issues Benchmarking Account

This document contains your account information. Please take appropriate care of this document and the credentials for your accounts. Instructions on the benchmarking program and use of these accounts is available at: <https://facilityissues.com/link/ci-help/>. Contact us with any revisions.

Your **Organization:** **Your Username**
Primary Contact Person for your account: **Contact Name**
Alternate Contact Person(s) for your account: **Alternate Name**
Invoice/Payment Method: Email Invoice

Facility Issues Website Account

This account is used to enter (and download) your organization's data and is accessed at: <https://facilityissues.com/>. Your organization is benchmarking the following site(s):

Username: **Your Username**
Password: **password** (you might have updated this)
Email address associated with this login: **Email** (this is email used for password reset)
Default **Sitecode** on charts (unless you override): **FFFF**

Username: **Your Username** (If multiple facilities benchmarked)
Password: **password** (you might have updated this)
Email address associated with this login: **Email** (this is email used for password reset)
Default **Sitecode** on charts (unless you override): **FFFF**

Power BI Reporting Account:

This account is used to access the benchmarking report results and is accessed at: <https://app.powerbi.com/>

Username: **Site@FacilityIssues.net**
Password: **password** (need to contact Facility Issues to reset password)

The following users have their organization Power BI account linked to the reporting and can access it at: <https://app.powerbi.com/home?ctid=9d0b841e-49ba-4985-9798-23979d6757c8>

None

General restrictions and support information: Facility Issues benchmarking participants have free and unrestricted internal use of files and information available to them as participants (to share with others inside your organization). Information is not allowed to be shared outside your organization except in compliance with the specific terms and conditions of the benchmarking program: <https://facilityissues.com/about/terms/>. Use of the websites or reports constitutes agreement with these terms. Any questions or technical support issues should be addressed to Robert Lambe. Comments and suggestions are welcome.

The Facility Issues Website

<https://facilityissues.com>

Click on My Account to login or open admin page

The screenshot shows the Facility Issues website dashboard. At the top, there is a navigation menu with links for ABOUT, BENCHMARKING, METRICS, STRATEGY, ARTICLES, CONTACT, and a search icon. A 'MY ACCOUNT' button is located in the top right corner. The main content area is divided into several sections:

- Survey(s) Enrolled In:** A section with a dropdown menu currently showing 'Museums & Cultural Institutions'. A callout points to this section with the text: 'Benchmarking program in which you are enrolled (hover over for menu)'.
- Payment Status:** A section showing 'Unpaid (Go to Cart)' and a 'Log Out' button. A callout points to this section with the text: 'Your account status'.
- Online Order Account Information:** A section with links for 'Dashboard' and 'Orders'.
- Instructions and Tips:** A section containing a list of links and guides:
 - New Participant?
 - Participant Agreement: PDF
 - Cultural Program On-Boarding Guide: PDF
 - Utility Program On-Boarding Guide: PDF
 - All Other Programs On-Boarding Guide: PDF
 - Process Guides:
 - Compendium of Facility Metrics PDF
 - Getting Started – Data Entry: PDF Video
 - Microsoft Power BI Reporting Interface: PDF
 - Tips for Using the Results: PDF
 - Links to Reporting:
 - Open the Report (Using account @FacilityIssues.net)
 - Open the Report (Using your linked business account – ask us if you need this setup)

Callouts for the 'Instructions and Tips' section include: 'This document' pointing to the first PDF link, 'Help documents for entering data, reviewing reports, and using results.' pointing to the 'Getting Started' and 'Tips for Using the Results' links, and 'Links to reporting website' pointing to the 'Open the Report' links.

Your password can be reset when logged in or recovered using the forgot password link on the website. Password recovery works for the email address above that is associated with the login

Technical "How-to" Guides

Reference guides can be found on your FacilityIssues.com account. Once logged in, PDFs and videos can be found on the right side of your screen under the title "Instructions and Tips."

Data Entry

"How to" enter data for benchmarking.

[Guide for Getting Started: Facility Data Collection and Benchmarking Data Entry](#)

Data Reporting

"How to" use the reporting interface.

[Guide to the Facility Benchmarking Reporting](#)

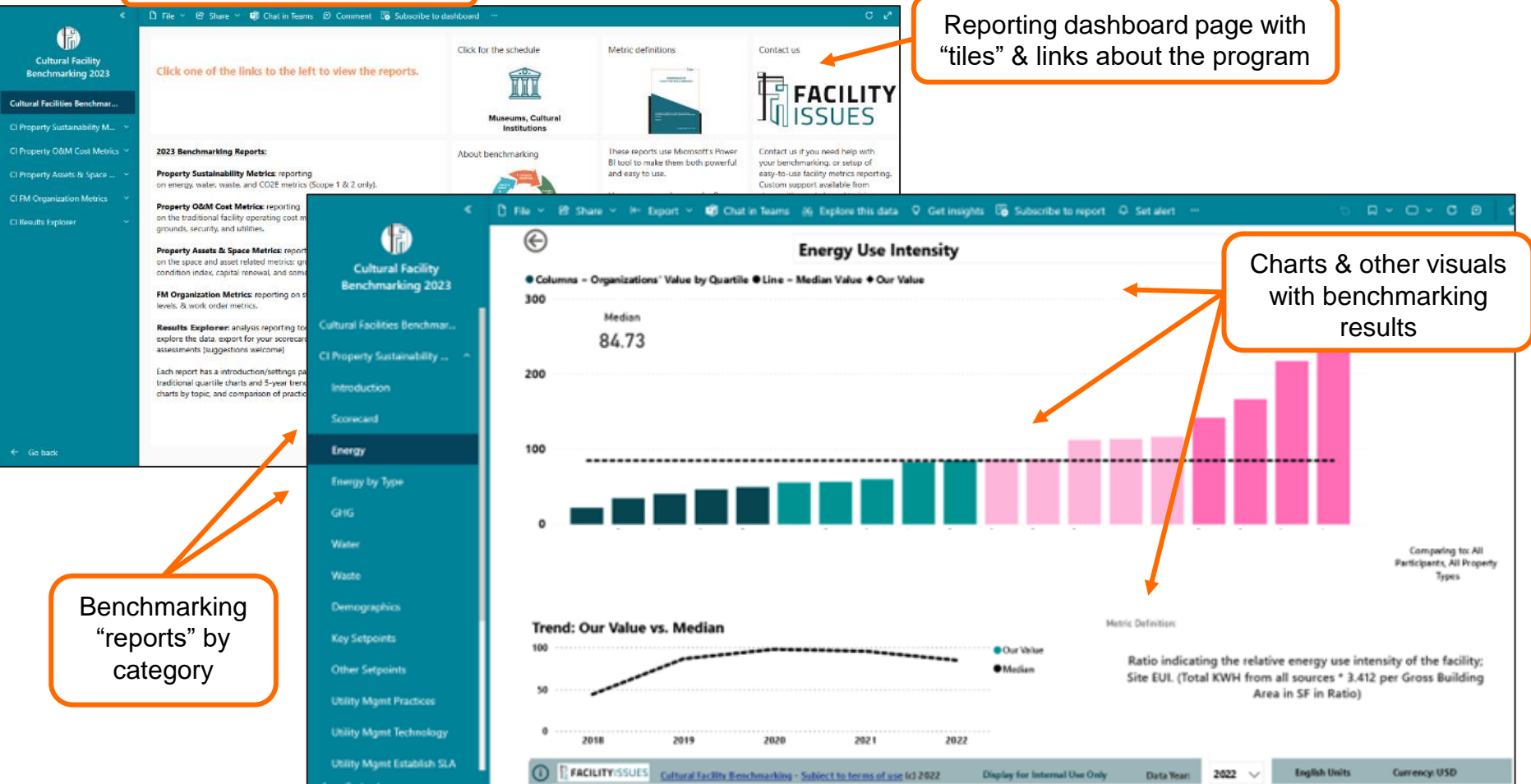
Data Analysis

Tips on using and interpreting the data.

[Tips for Using Data from the Facility Issues Benchmarking Program](#)

The Reporting Website (Power BI)

<https://app.powerbi.com/>



You have to email me to change or reset your password for your __@facilityissues.net account. If you have a Power BI Pro or better license, we can link these reports to your account.

Participating in the Shared Practice Meetings

There is a regular one-hour networking meeting ~ monthly on Zoom

- These meetings provide a regular forum to hear about what others are doing and share your experience. Equally valuable as the metrics is this ability to discuss “best practices” with other cultural facility managers
- Presentation of case studies by your organization are encouraged – contact us if you are willing to share one
- Tentative meeting topics are posted on website but please contact us with other suggestions (<https://facilityissues.com/cultural/schedule/>)
- Leads, alternates, and any associates on the mailing list will receive email notifications of shared practice meetings
 - Meetings are open to anyone in your organization so you can forward information to others
 - There is a shared practice survey associated with most meetings – these are short and do not require data lookup so please participate

Participating in the Annual Workshop

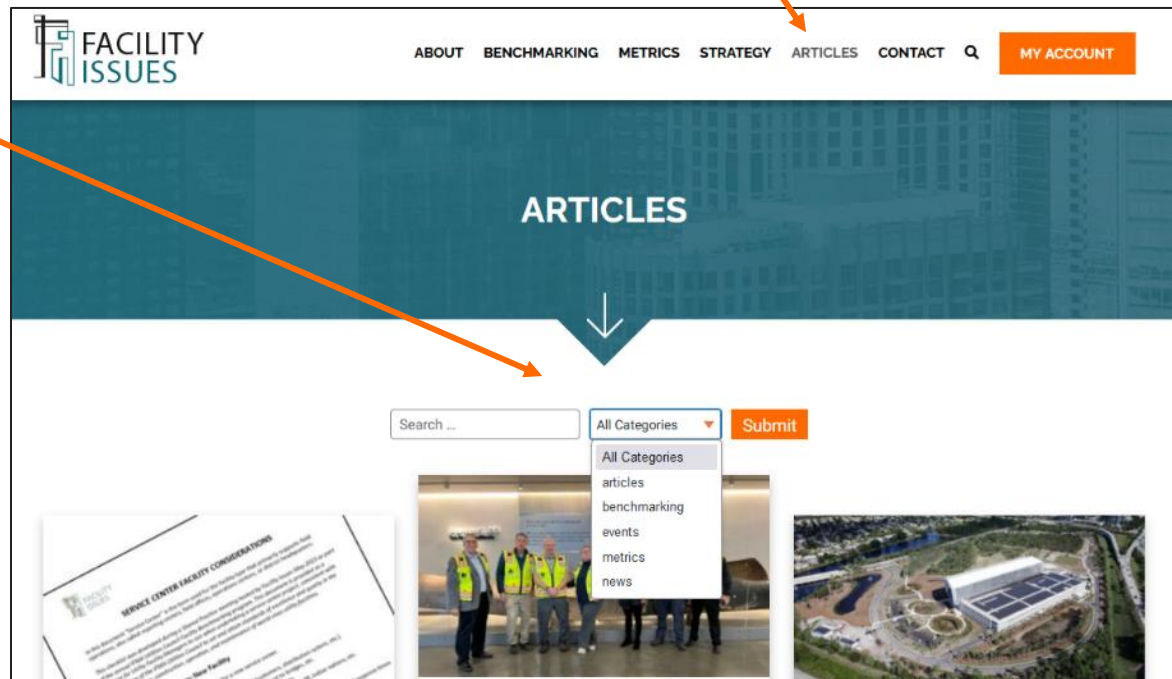
There is a full day pre-conference session at the annual IAMFA conference

- This meeting provides a review of the year's program, some educational presentations, and general discussion of current issues and lessons learned among the attendees
<https://facilityissues.com/product/cultural-workshop/>
- This is a great opportunity to ask 30+ international experts about the lessons learned in their cultural facility operations
- One registration per benchmarked facility is included with the benchmarking; additional attendees can register with payment, space permitting.

General References

Many general reference documents, presentations, and white papers are available on the Facility Issues website.

- You can search by keyword or category to find the information you want.



Additional Services and Training

We offer facility planning & metric support services:

- “Done for you” support for your benchmarking data assembly.
- FM Metric Training & Mentoring (especially Advanced Excel, Power BI as applied to facility-related data)
- FM Metric/Scorecard Setup & Support (to help groups with limited analyst resources streamline their internal data assembly and reporting)
- Occupant Satisfaction Surveys
- Custom planning / assessment studies

Questions & Technical Support

Phone and email support is available
business hours (Eastern Time).

Robert Lambe, CFM, ProFM
315.601.6010

Rlambe@FacilityIssues.com

Schedule a 1:1 call or web meeting to get
help on a specific benchmarking issue or
just to chat about your situation:

<https://calendly.com/lambe/30min>