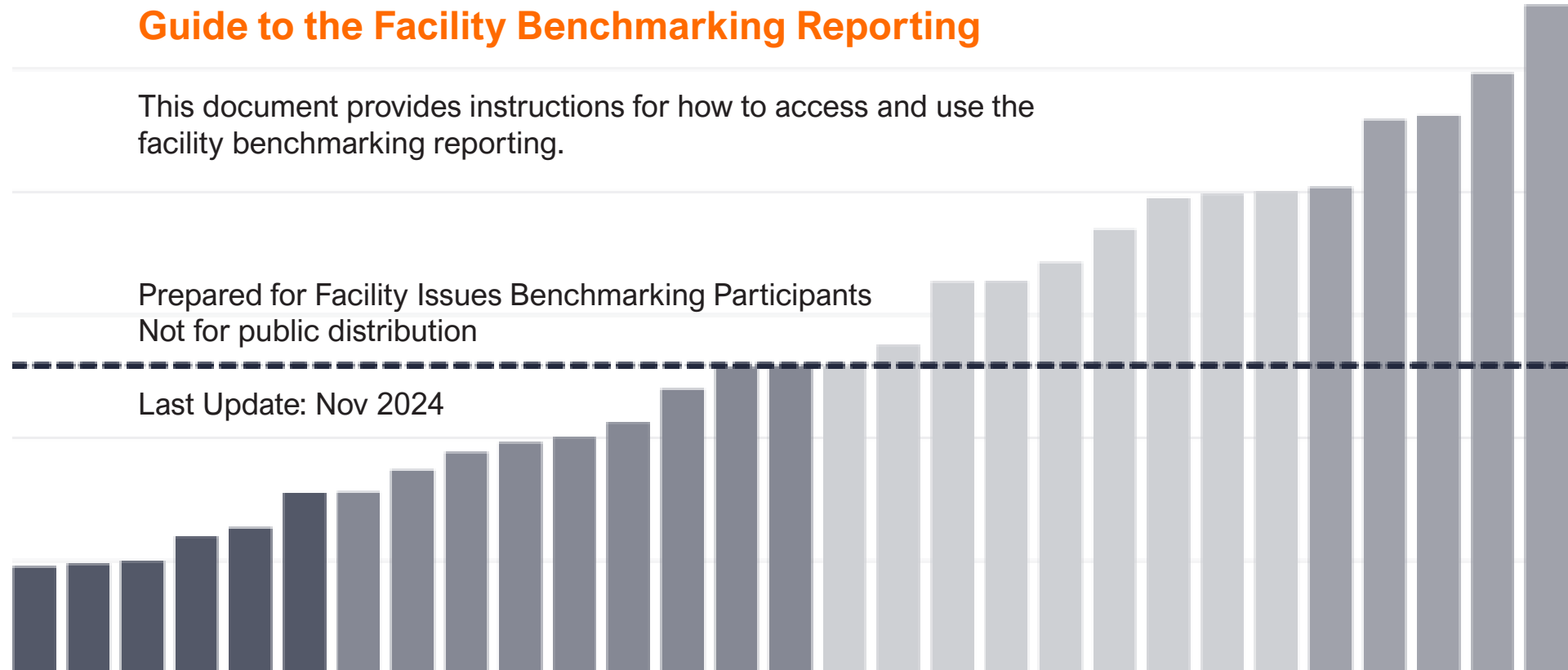# Facility Benchmarking

Guide to the Facility Benchmarking Reporting

This document provides instructions for how to access and use the facility benchmarking reporting.

Prepared for Facility Issues Benchmarking Participants
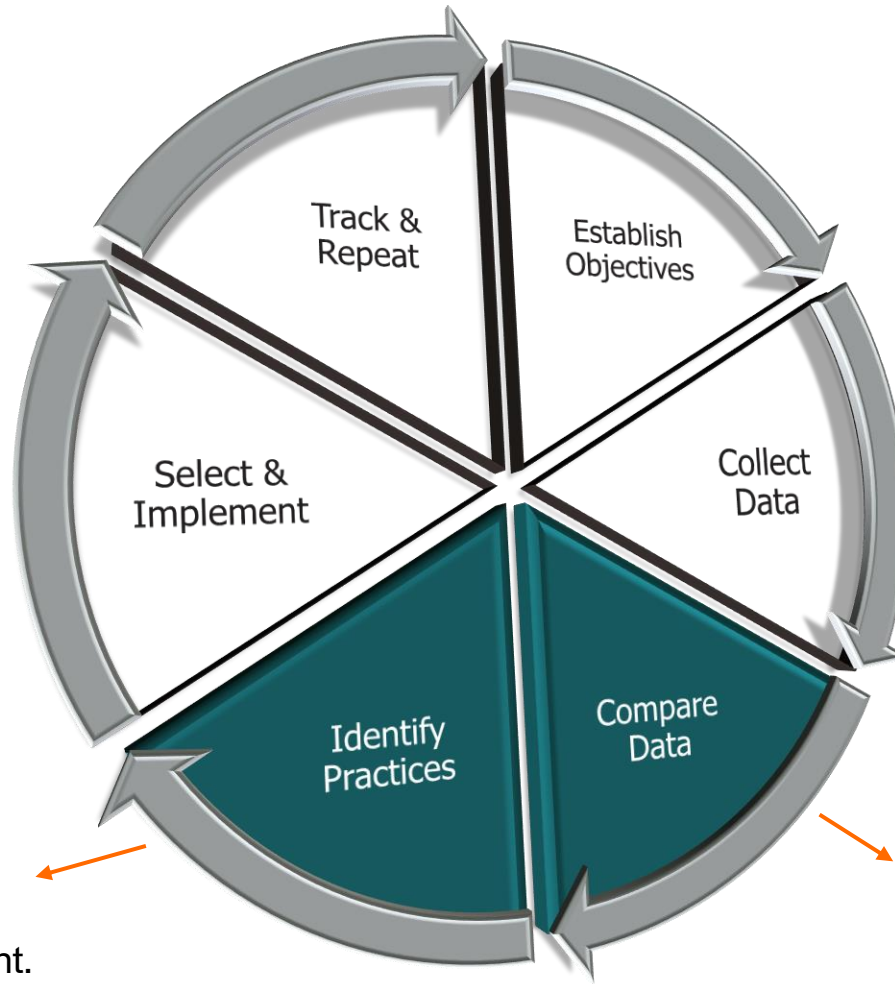Not for public distribution

Last Update: Nov 2024

Where We Are in The Facility Benchmarking Process

This document will address the middle 2 steps in the benchmarking process.

Review of the data reporting interface.

Identify practices & technology that your organization might consider for performance improvement.

Compare your metrics vs. peers to identify areas of interest or concern.

Article on Benchmarking Process:
https://facilityissues.com/facility-benchmarking-process/

FACILITY ISSUES

Compare Data & Practices

Review the benchmarking results to.

- Identify items of potential interest to leadership, regulators/funding sources, your department, the public

- Determine how the metrics support your story:
    - Document successful performance
    - Document progress on ongoing initiatives
    - Identify areas with potential for improvement

- Pay attention to current values and trends

- Identify any additional metrics you want/need (for next year)

    - Contact us for help or questions

The goal is to "sort" the data into a manageable set of metrics for attention

Suggest using a leader / competitive / not priority approach (see separate guide on Using Results)

Tip

Understand your objectives and organization's current priorities as the basis for reviewing the data for conclusions or opportunities.

FACILITY ISSUES

Your Facility Issues Account(s)

Program Reference information on right side of account page

ABOUT   BENCHMARKING   SERVICES   GROUPS   ARTICLES   CONTACT   Q   MY ACCOUNT

Account information provided in a reference document

Instructions and Tips

- New Participant?
  - Participant Agreement: **PDF**
  - Cultural Program On-Boarding Guide: **PD**
  - 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 Video**
  - Tips for Using the Results: **PDF Video**
- Links to Reporting:
  - **Open the Report** (Using Facil...
  - **Open the Report** (Using your ... us if you need this setup)

Links to copy of this document and other guides

Your Facility Issues Benchmarking Account

This document contains your account information so please take appropriate care of this document and your credentials in general. Last updated: 11/1/23

Your Organization:

Facility Issues Website

Link: https://facilityissues.com/
Username:
Password:
Your password can be reset once logged in or recovered using the forgot password link on the website.

Name associated with this login:
Email address associated with this login:
Alternate contact person on this account:
Persons with company Power BI account linked to reporting:

Default Sitecode (for report):

This is the Data Entry account

This is the Power BI account

Power BI Reporting

Link using account @facilityissues.net: https://app.powerbi.com/
Link using your company account (if listed as contact person above):
    https://app.powerbi.com/home?ctid=9d0b841e-49ba-4985-9798-23979d6757c8
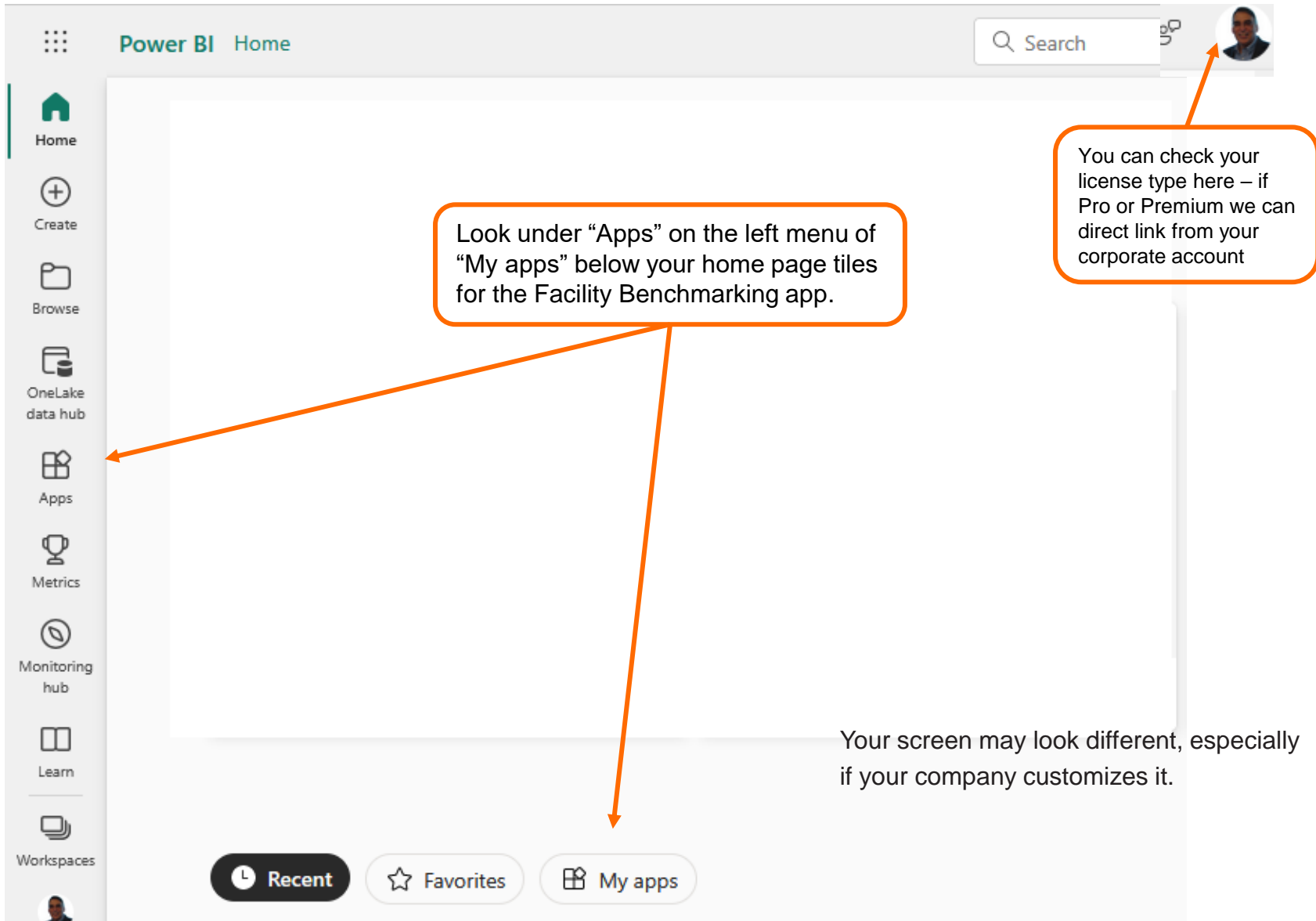Username:
Password:

Contact me if you need to reset your password.

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 copies with others inside your organization who are providing or use the data). Copies are not allowed to be shared with persons outside your organization per the terms and conditions of the benchmarking program, and there shall be no identification of

Use this link to go to Power BI reporting site

If you use your own Power BI license (Pro or better), use this link instead!

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The Power BI Home Screen

Look under "Apps" on the left menu of "My apps" below your home page tiles for the Facility Benchmarking app.

You can check your license type here – if Pro or Premium we can direct link from your corporate account

Your screen may look different, especially if your company customizes it.

FACILITY ISSUES

Insight from your facility data

Standard Menu and Visualization Controls

Export a copy of the report (exactly as shown) to PPT or PDF file.

Reset to clear all filter settings for entire report.

Bookmark to save your current settings.

Hover over a visual to get additional options

Make a visual full screen

Funnel show all filters applied to a visual.

Export the data to CSV file
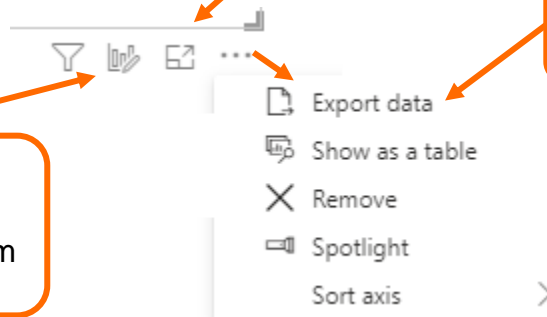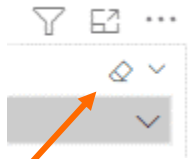
Personalizing the graphic by removing some categories from the chart

Export data
Show as a table
Remove
Spotlight
Sort axis

Eraser clears any settings from individual filters.

When done, reset the visual

FACILITY ISSUES

Benchmarking App "Dashboard"

Menu lists Reports by Topic – click on report to list pages in it

You may have top menu (if set for classic view)

Power BI | Cultural Facility Benchmarking 2022 — Cultural Facilities Benchmarking ∨ — Search

📄 File ∨ | 🟦 Chat in Teams | 💬 Comment | ✉ Subscribe | ⋯

Cultural Facility Benchmarking 2022

Cultural Facilities Benchmarking

CI Property O&M Cost Met... ∨

CI Property Sustainability ... ∨

CI Property Assets & Space... ∨

CI FM Organization Metrics ∨

Click one of the links to the left to view the reports.

Click for the schedule

Museums, Cultural Institutions

Click for metric definitions

About benchmarking

Click to contact us

FACILITY ISSUES

2022 Benchmarking Reports:

Property Sustainability Metrics: reporting on energy, water, waste, and CO2E metrics (Scope 1 & 2 only).

Property O&M Cost Metrics: reporting on the traditional facility operating cost metrics, maintenance, cleaning, grounds, security, and utilities.

Property Assets & Space Metrics: reporting on the space and asset related metrics; gross areas, net areas, facility condition index, capital renewal, and some occupancy metrics.

FM Organization Metrics: reporting on staffing ratios, service leverls, & work order metrics.

Each report has a "dashboard summary page," the traditional quartile

These reports use Microsoft's Power BI tool to make them both powerful and easy to use.

Here are some references for Power BI:

- Learn more being a Microsoft Power BI report consumer

- General info on Microsoft Power BI

Have Facility Issues help you with your benchmarking, or general facility metrics reporting. From providing support, training/mentoring staff, to done-4-U services, to custom scorecard setup.

"Tiles" provide some descriptions and links to more information.

Mobile device view also available but all benchmarking pages not yet customized

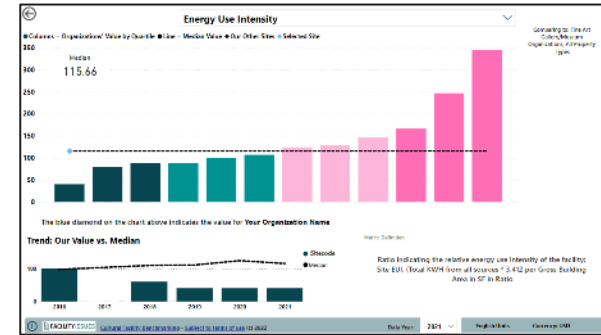**FACILITY ISSUES**
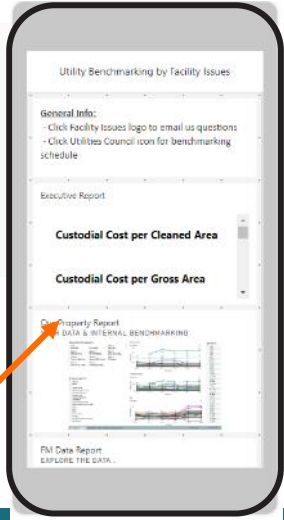
General Structure (of all Reports)

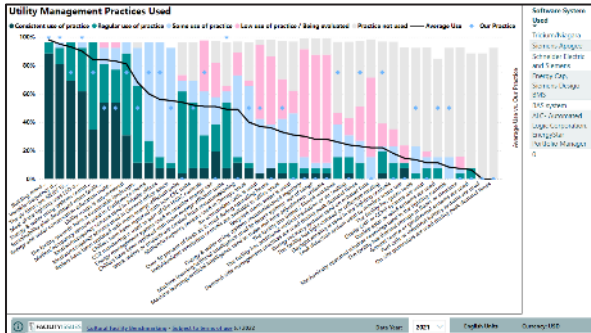**Introduction Page:**
Some Key Settings
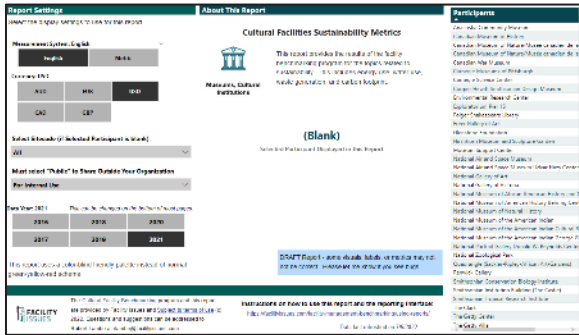
Scorecard Page:
Some Key Metrics
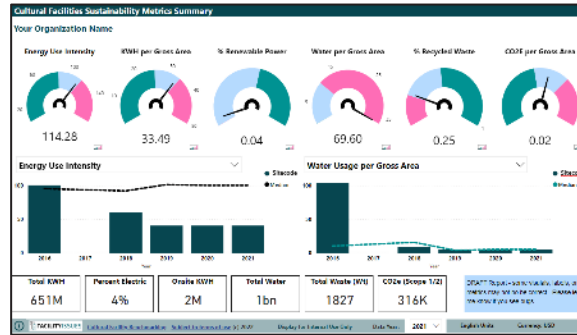
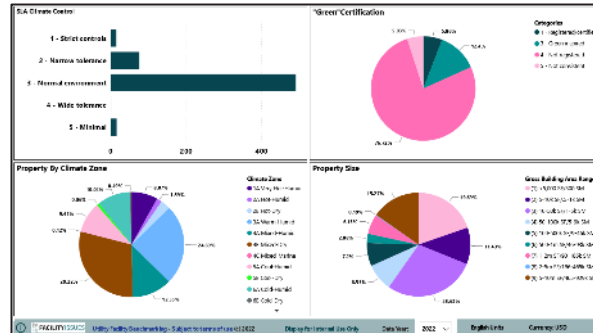**Quartile Chart Pages:**
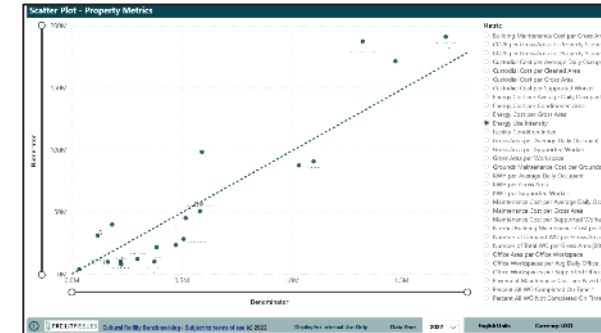**Core Metric Comparison (by topic)**

Practices Chart Pages:
Practice Adoption (by topic)

Demographics Pages:
About the Comparison Group

Special Pages:
Special Charts, Comparisons, & more

Insight from your facility data

Introduction Page

Report title and short description

Select the units of measure and currency to display in report.

Select the site code for the property to display (if you benchmark more than one)

To save/share a report outside your organization, select "Public" to remove other organizations' labels.

Select the data year to display (can change on most pages)

Link to program information and terms of use

A link to this help document.

The date of last data refresh is shown here.

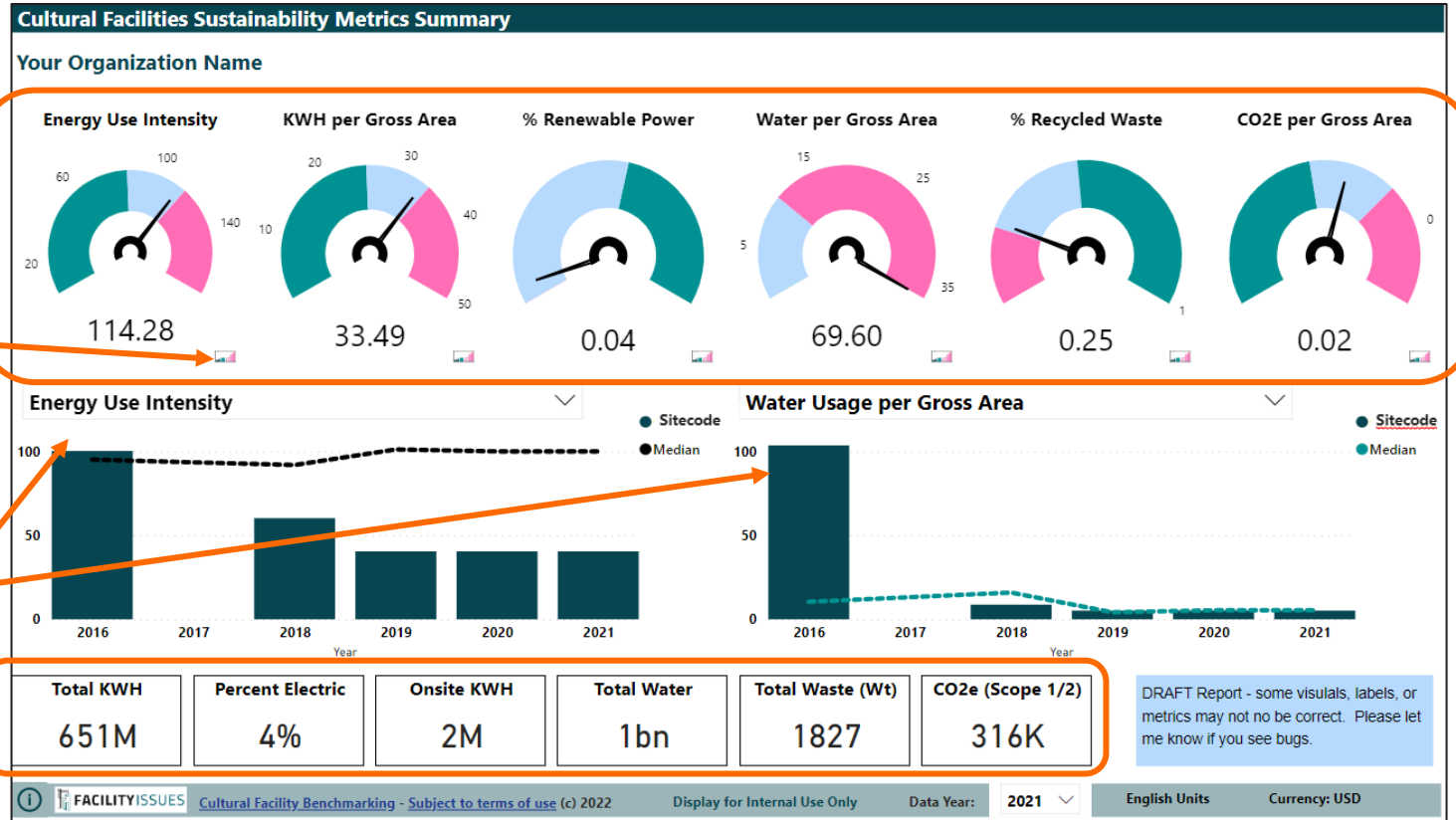Notes to users have blue background.

Scorecard Page

Dashboard of key metrics for report topic

Chart icon to jump to associated quartile chart page

Trend charts for 2 selected metrics

Data cards with key stats for report topic

Report footer has reference links, slicer to change the selected data year, and display of the units, currency and privacy settings.

Quartile & Trend Pages
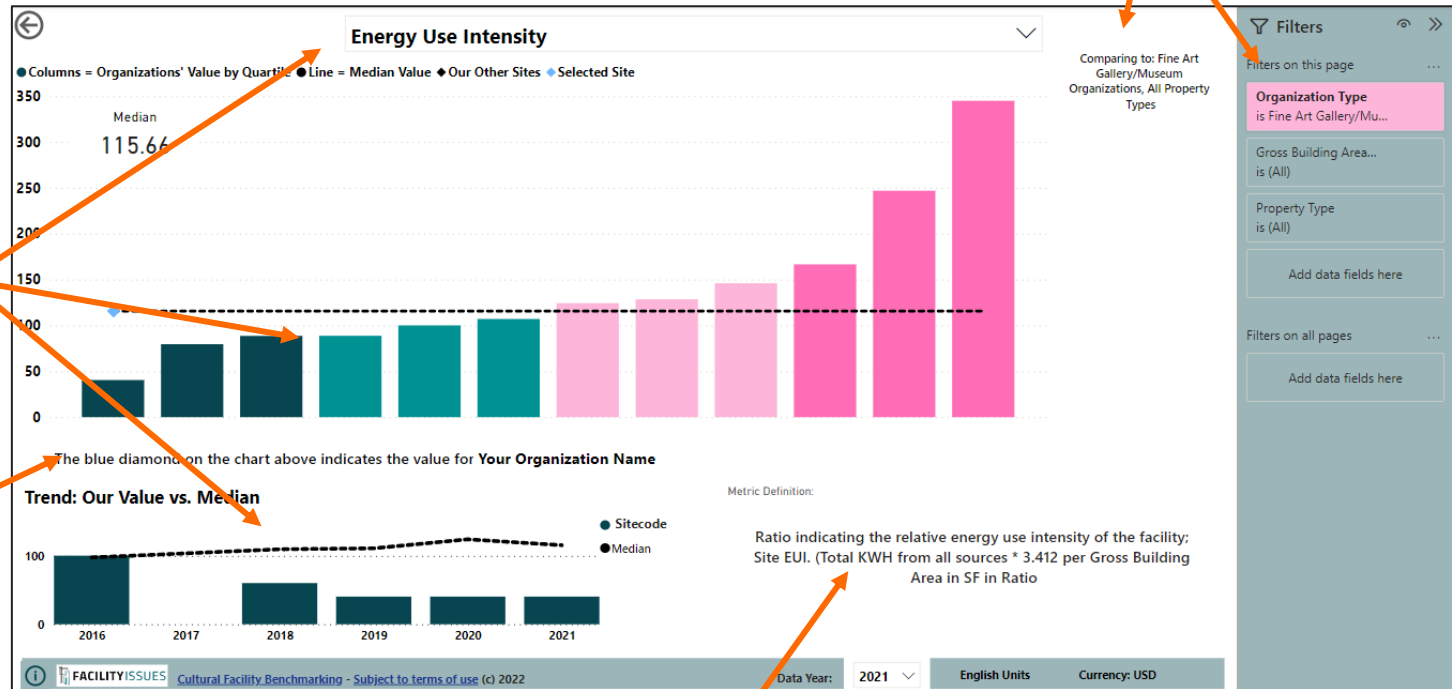
Back button jumps to scorecard page

Filter pane lets you apply some data filters and applied filters have different background color for visual confirmation. Filter selection displayed on report for reference on exports.

Quartile chart and trend chart display for selected metric

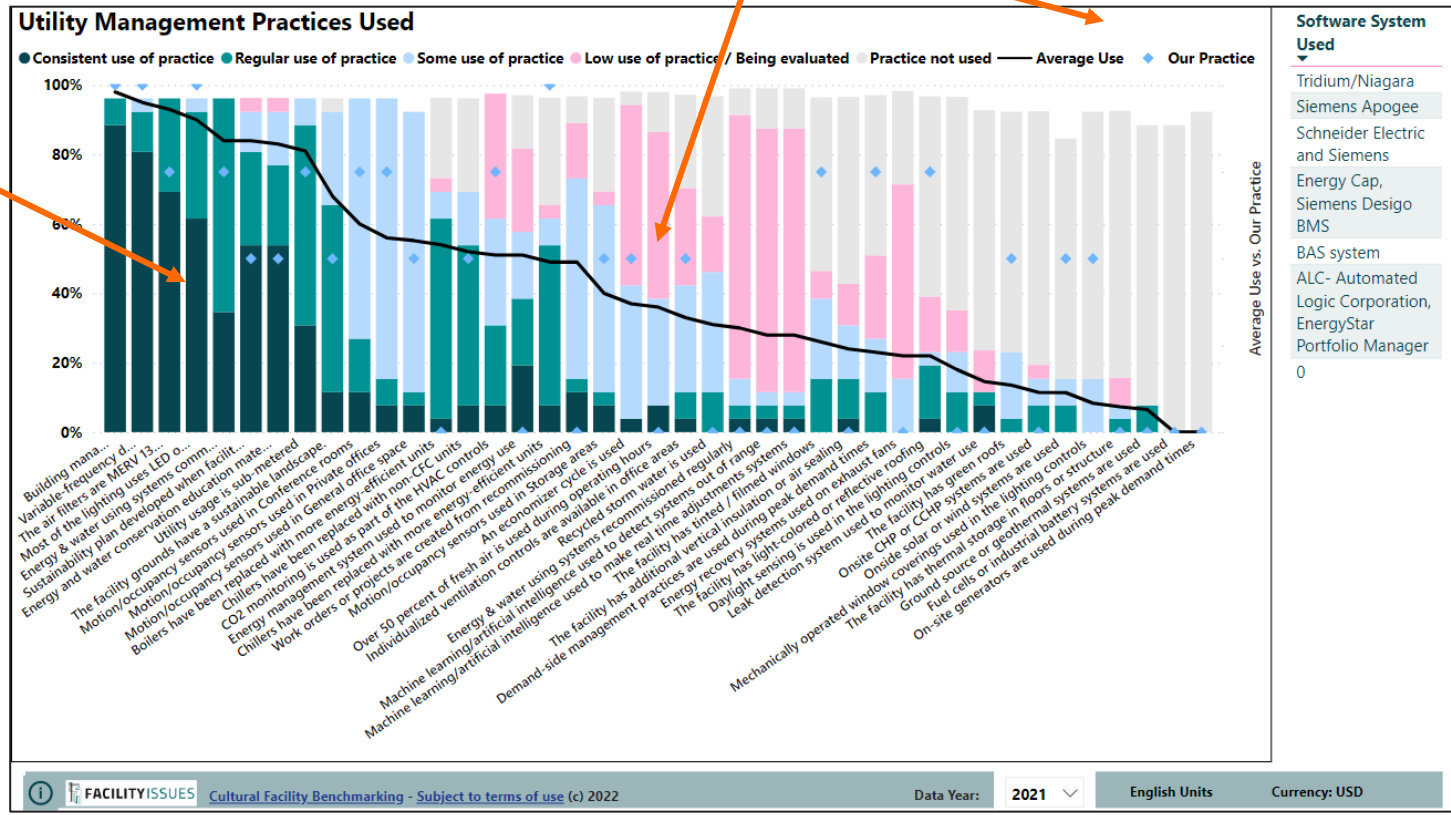Site codes displayed for internal use and "hidden" for public use.

Metric definition displayed for reference.

Practices Page

You can compare your use (blue diamonds) vs the average use (black line) to see which practices others employ more.

The degree of use of various practices is scored from consistent use to not used

Utility Management Practices Used

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

Software System Used
- Tridium/Niagara
- Siemens Apogee
- Schneider Electric and Siemens
- Energy Cap, Siemens Desigo BMS
- BAS system
- ALC- Automated Logic Corporation, EnergyStar Portfolio Manager
- 0

FACILITY ISSUES — Cultural Facility Benchmarking - Subject to terms of use (c) 2022 — Data Year: 2021 — English Units — Currency: USD

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Questions, Problems, or Suggestions?

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