

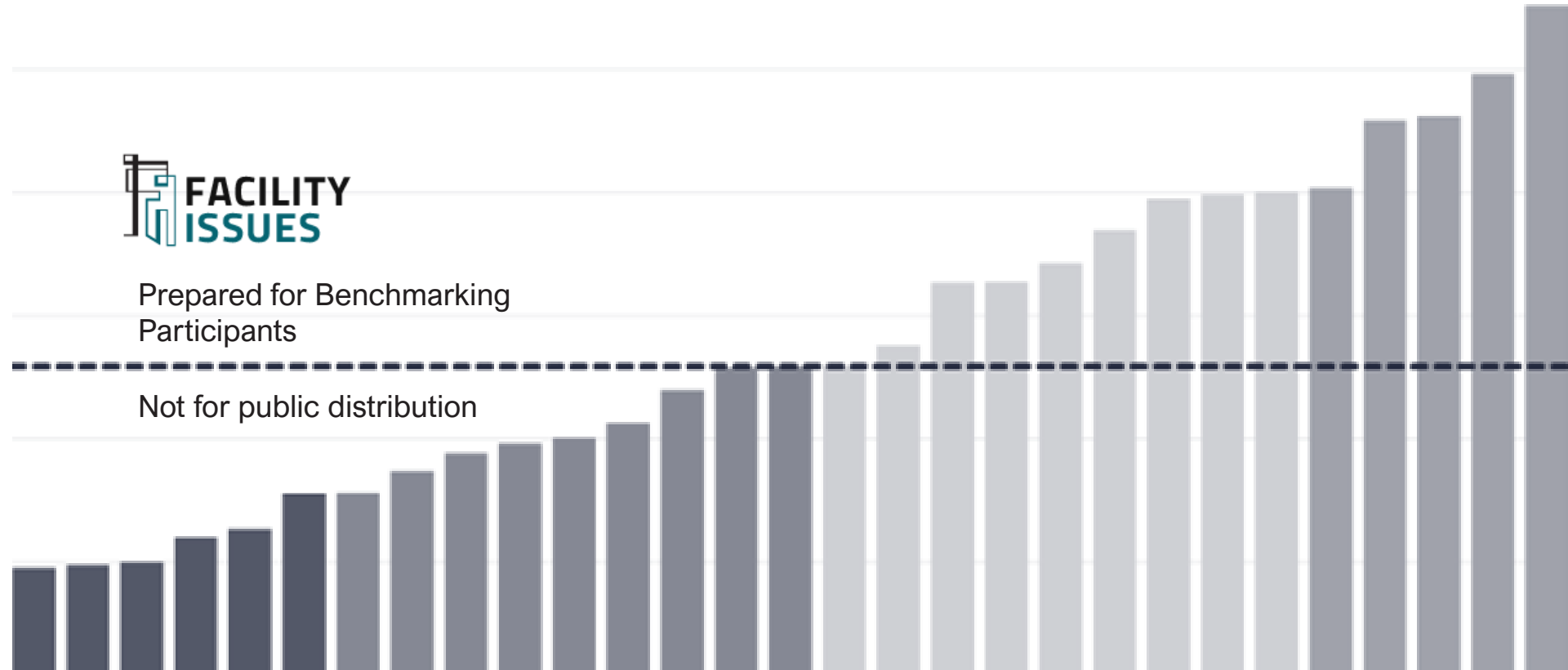
Benchmarking Program Reference Guide

Utility Facility Benchmarking



Prepared for Benchmarking
Participants

Not for public distribution



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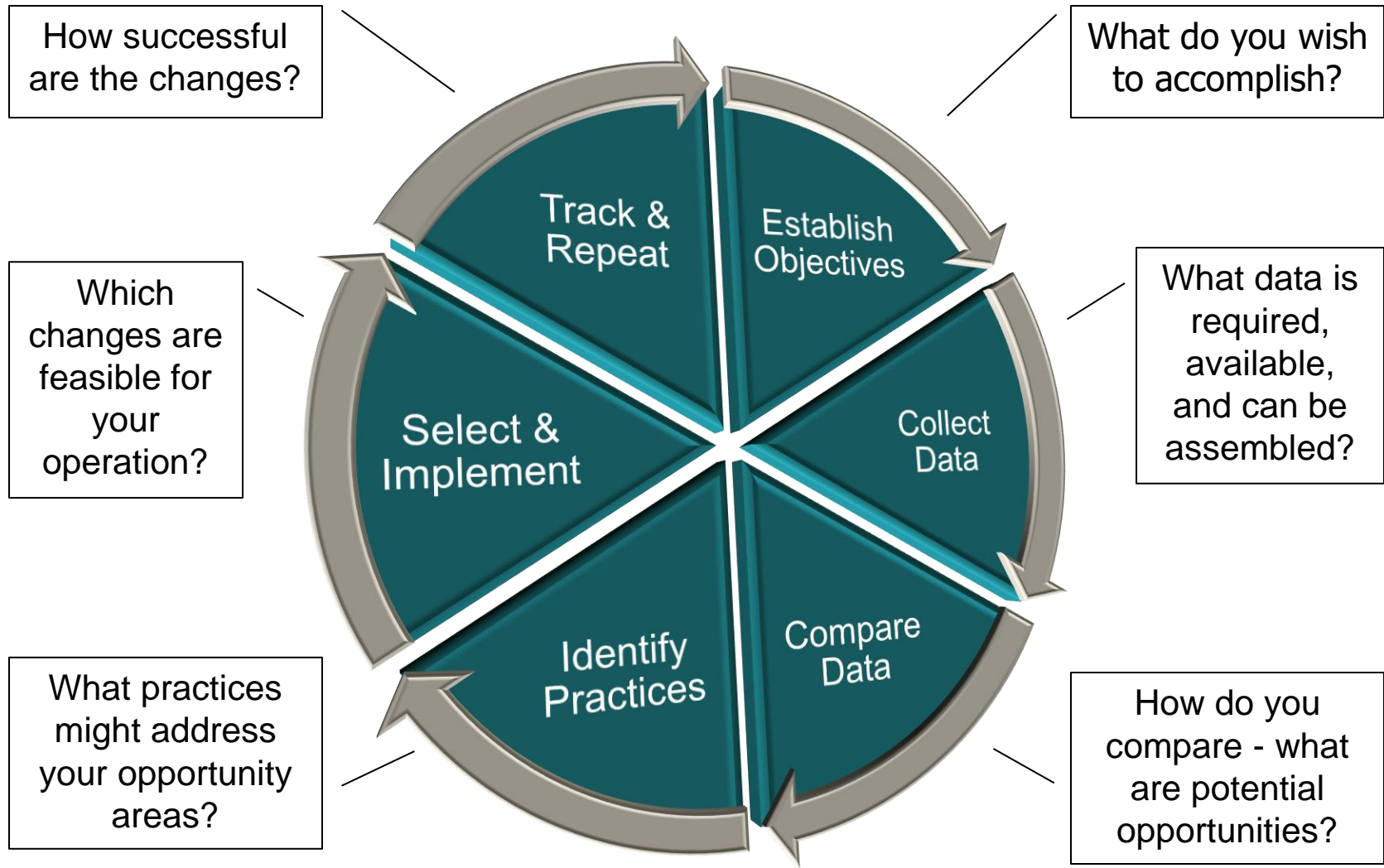
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The Benchmarking Process



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

About the Utility Facility Benchmarking Program

Endorsed by IFMA Utilities Council

- US-wide participation, some CA
- All Utility Companies are welcome (recommend others join!)
- Program run by Facility Issues

Annual benchmarking program since 1995

- Benchmarking (Metrics Reporting)
 - Technical Support as needed
- Networking and Sharing
 - Shared Practice Meetings (~monthly on MS Teams)
 - Regional Networking Meetings (in-person 2x/year)

Additional support / related services available from Facility Issues

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

Overview of Program: <https://facilityissues.com/link/utility-program/>

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

- Jan / Feb - Renewal Notice or Sign-up Welcome
- ~Apr 1 – Getting Started, Data Entry
- ~ Jul 1 – Draft Report available, Data Entry continues
- Final Report – 2 Weeks After IFMA UC Fall Meeting
- November, 2nd Tuesday – Report Review Meeting

Shared Practice Meetings

- Monthly, 4th Tuesday of the month Jan - Sep
- Semi-annual Eastern/Western Utility Group Meetings

Steering Committee Meetings (talk about the program)

- Monthly, 2nd Tuesday of the month Jan - Aug

Up to Date Schedule: <https://facilityissues.com/utilities/schedule/>

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

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 (or your own account)

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



ABOUT BENCHMARKING METRICS STRATEGY ARTICLES CONTACT Q

MY ACCOUNT

Survey(s) Enrolled In

Utilities Council

Benchmarking program in which you are enrolled (hover over for menu)

Your account status

Payment Status

Unpaid (Go to Cart) Log Out

"How-to" Guides:
Help documents for entering data, reviewing reports, and using results.

Instructions and Tips

- 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)

This document

Links to reporting website

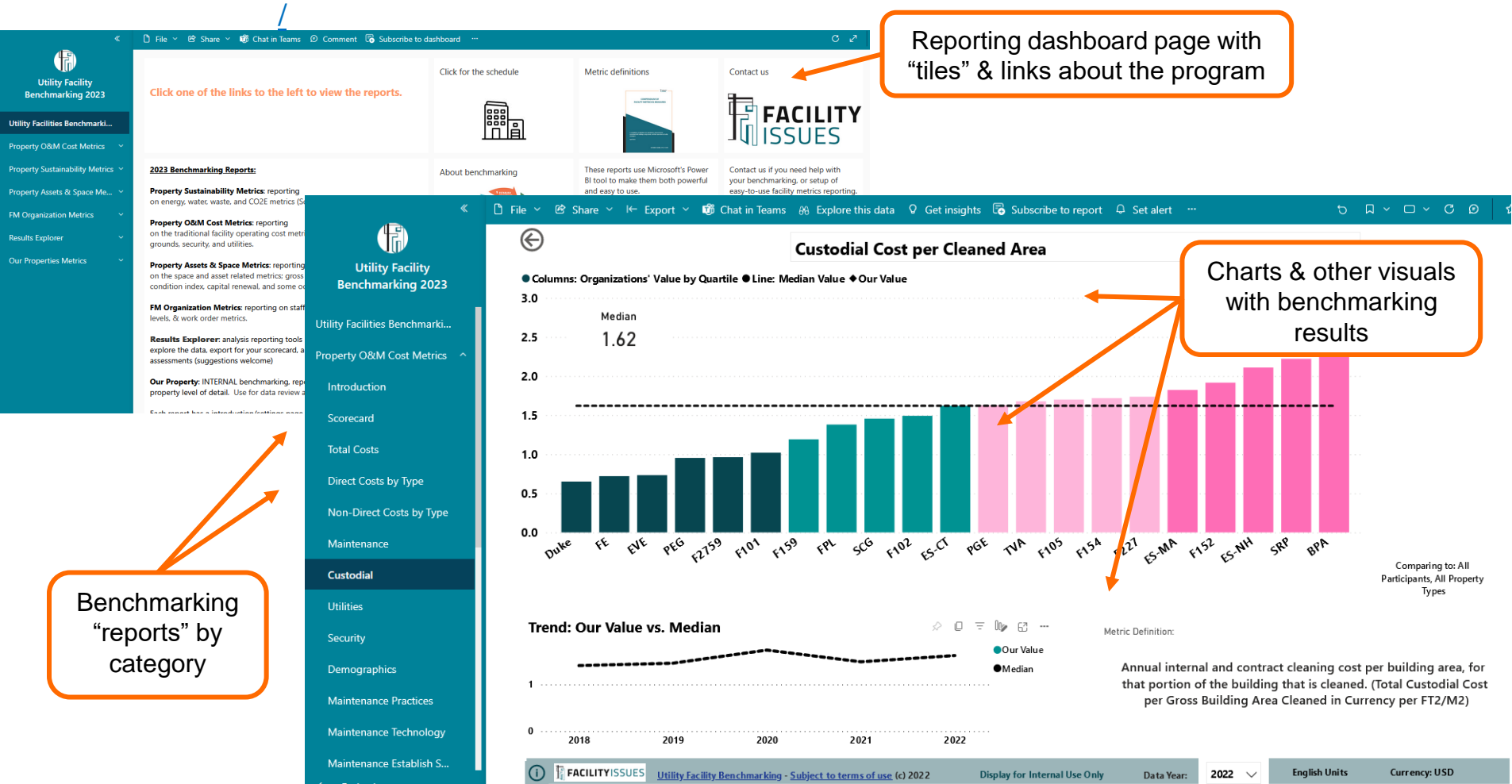
Online Order Account Information

- **Dashboard**
- **Orders**

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

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

Equally valuable as the metrics is the ability to discuss best practices and lessons learned with other cultural facility managers

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

- These meetings provide a regular forum to hear about what others are doing and share your experience.
- 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/utilities/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 EUG/WUG Meetings

These are 1-1/2 day regional in-person networking meetings hosted by a utility

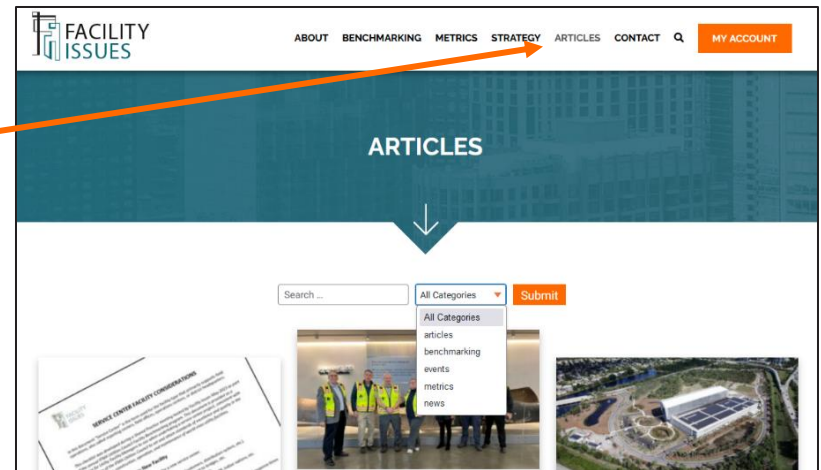
- This meeting provides a review of the year's program, presentations of things going on at various utilities, and general discussion of current issues and lessons learned among the attendees
<https://facilityissues.com/product/eug-wug-meeting/>
- This is a great opportunity to discuss current issues and share lessons learned with others in the small group format.
- Registration for 1-2 persons at each meeting is included with the benchmarking; additional attendees can register for small fee to offset costs (no charge for host utility staff)

Additional References, Services and Training

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

We also offer facility planning & metric support services:

- “Done for you” support for your benchmarking data assembly.
- FM Metric Training & Mentoring (Advanced Excel & Power BI as applied to facility-related data)
- FM Metric/Scorecard Setup & Support (to help organizations with limited analyst resources to 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>