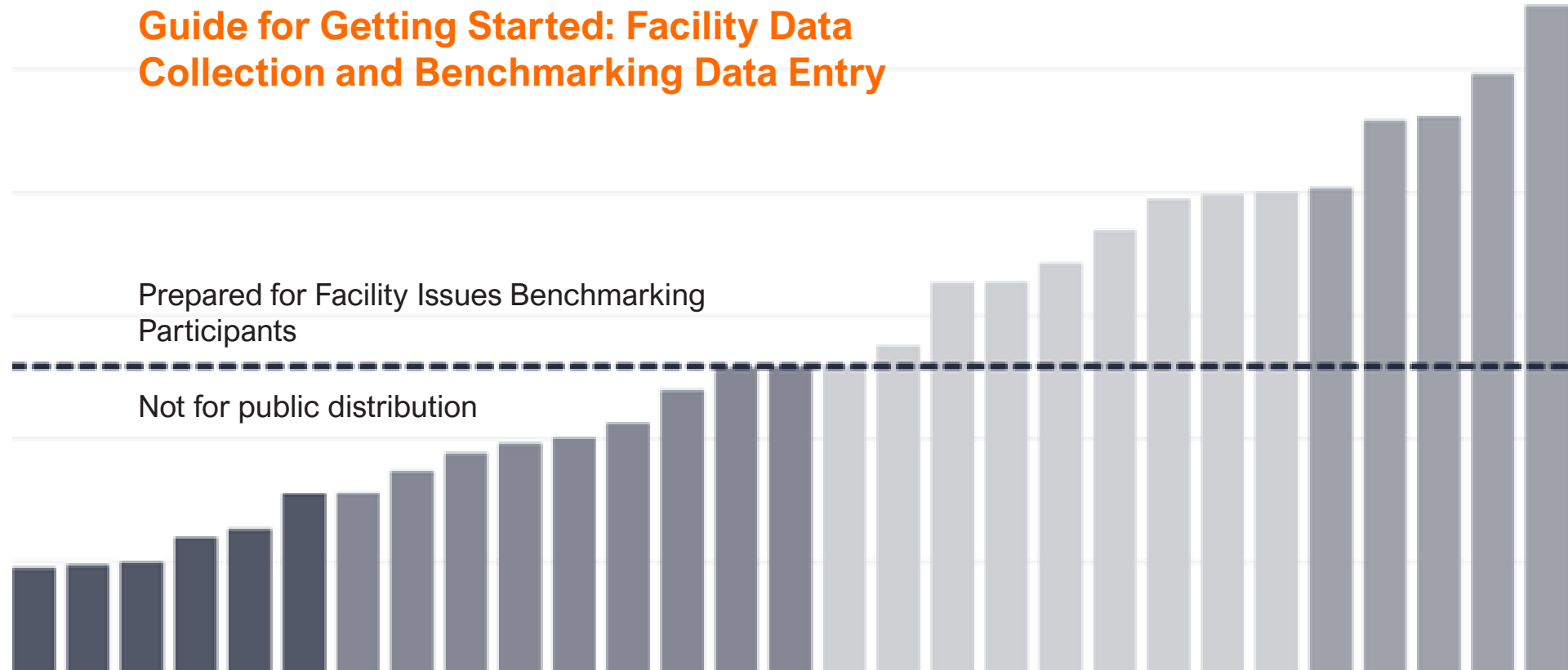


Facility Benchmarking

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

Prepared for Facility Issues Benchmarking
Participants

Not for public distribution



OVERVIEW

This discussion will address activities for the first 2 steps in the benchmarking process.

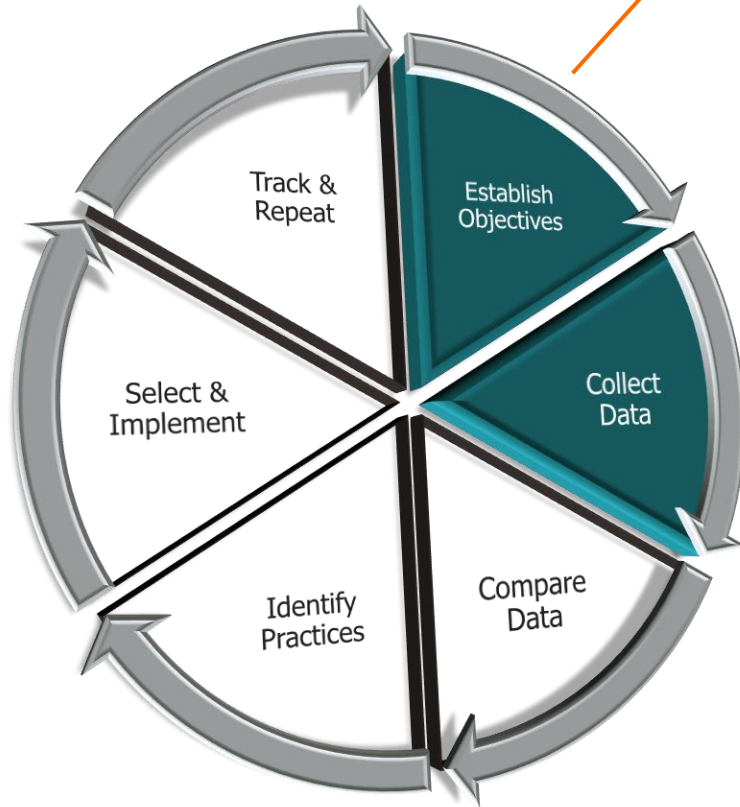
The focus will be a review of the data template and how to load it into the system.

Establish Objectives

Identify your organization's objectives (Will determine the metrics/data of most interest)

Collect Data

Determine what data to collect, where to find it, and how to assemble and submit it.



Clarify Benchmarking Objectives

Since benchmarking is an ongoing activity, the objective(s) should be re-visited each cycle to reflect changing needs and priorities of your organization.

Typical Objectives Include:

- To quantify your situation (internally)
- To learn how you compare (vs. industry)
- To identify areas for near term attention
- To justify proposed initiatives
- To promote change/new thinking
- To learn from others
- To keep getting better
- To monitor trends (internal and industry)

Typical Topics of Interest:

- Operating costs
- Space ratios
- Facility condition and reinvestment
- Asset management
- Sustainability metrics
- Staffing levels
- Practices and technology used

Assembling Your Data


Identify & assemble the data you will need for benchmarking:

- Use the benchmarking template to identify specific types of data
- Start with what you have readily available:
 - Data in your finance and work systems
 - Department excel files about your properties
 - Annual reports on finances, employees, staffing, etc.
 - Knowledgeable persons in department (about your practices)
- Focus on your areas of most interest:
 - What are your benchmarking objectives?
 - What topics are of current interest to your leadership?
 - Suspected areas with opportunity for improvement?
- Identify what data you want/need to build for next year
- Contact us if you want help assembling your data

Your Facility Issues Account(s)

You should have your account info as shown to the right:

- Use THIS account to enter your data →
- *This account is for the results reporting (described in a separate reporting guide)* →



Your Facility Issues Benchmarking Account

This document contains your account information so please take appropriate care of this document and your credentials in general.

Your Organization: **Your name**

Facility Issues Website

Link: <https://facilityissues.com/>
Username: **Your Username**
Password: *not included here because you may have reset it
Name associated with this login: **First and last name of contact person**
Email address associated with this login: **Email of contact person**
Other contact persons on this account: **Other contact persons who get communications**
2018 Sitecode (for report): **Your Code # (on reports)**

Your password can be reset once logged in or recovered using the forgot password link on the website.

Power BI Reporting

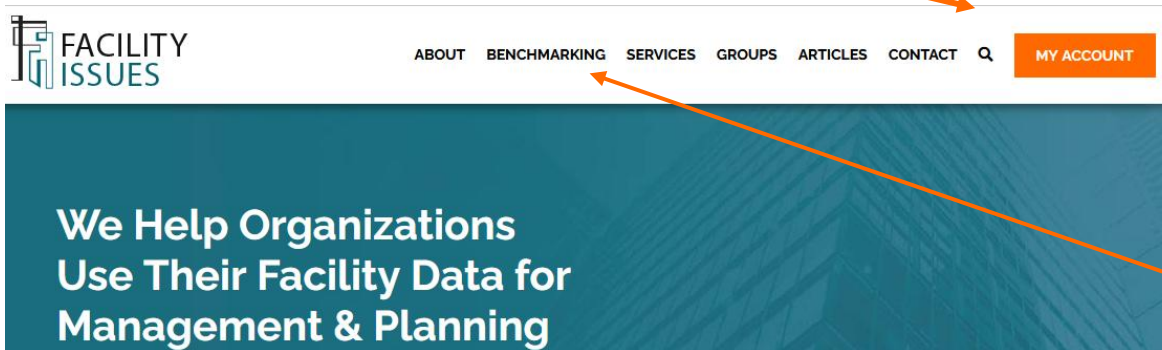
Link: <https://app.powerbi.com/>
Username: **Your Username**
Password: **Your Password**

Contact me if you need to reset your password.

STEP BY STEP

Navigating the website

1. <https://facilityissues.com>
2. Click on the orange “My Account” button



3. Login (or enroll to create new account)

Note: key milestone dates for the benchmarking program are listed on the schedule page along with other activities.

Your Account Page

Links to help documents
(including this one)

4. Your program will be listed on your account page (anytime you want to return to this page you can click on the orange “Enroll/Log In” menu item)

The screenshot shows the 'Your Account Page' with the following sections:

- SURVEY(S) ENROLLED IN** (highlighted with an orange box):
 - Facility Managers Roundtable
 - Museums & Cultural Institutions
 - Research Facilities
 - Utilities Council
 - Core Metrics
 - Critical Facilities
 - Energy Use Intensity
- PAYMENT STATUS**: Unpaid [Pay My Bill](#) [Log Out](#)
- INSTRUCTIONS AND TIPS**: Pages with reference documents will open in a new window.
 - Getting Started [PDF](#) – What's new in 2021? [PDF](#)
 - Guide to the Facility Issues website: [PDF](#) [Video](#)
 - Entering your data with online forms: [PDF](#) [Video](#)
 - Entering your data with Excel template: [PDF](#) [Video](#)
 - Other Benchmarking reference info: [Webpage](#)
 - Compendium of Facility Metrics & Measures [PDF](#)
 - Benchmarking Participant Agreement: [Webpage](#)
 - Guide to the Microsoft PowerBI report: [PDF](#)
 - [Open the Report](#) (PowerBI login using @facilityissues.net account or [Open using your own PBI account](#))
 - Getting value from your benchmarking report: [Webpage](#)

5. Hover your mouse over the program name, and you will see new links appear – click the “Go To Survey” link

The screenshot shows the 'Research Facilities' hover menu with the following links:

- [Go To Survey](#) (highlighted with a red box and a hand cursor)
- [Members Area](#)
- [Edit Properties](#)

Cost Survey Home Page – For Online Data Entry

(The main benchmarking program was traditionally called the cost survey)

- The list of properties is the top left of the page. The survey form will show different survey sections for organization/department vs. property data based on the item selected on the top left.

“All Properties” is organization level data.

The screenshot shows the 'COST SURVEY' home page. On the left, under 'MY PROPERTIES', the 'All Properties' link is highlighted with an orange box. An orange arrow points from this box to the 'NEXT SECTION' button in the main content area. The main content area has a header 'COST SURVEY' and a 'NEXT SECTION »' button. Below the header, it says 'Welcome to your cost survey.' and provides a brief overview of the survey. On the right, there is a 'WELCOME, FACILITY TEST USER' message with a 'Pay for your survey here' link and a progress bar at 30%. Below that is a 'SURVEY LINKS' section with links to Organization Info, Facility Services, Best Practices, Performance Survey, Learning From Others, and Feedback. At the bottom right, there is a 'MEMBERS ONLY' section.

All the properties you benchmark are listed and can be selected

The screenshot shows the 'COST SURVEY' home page with 'Office Building' selected under 'MY PROPERTIES', highlighted with an orange box. An orange arrow points from this box to the 'NEXT SECTION' button in the main content area. The main content area has a header 'COST SURVEY' and a 'Section F: Property Info » Property Demographics' sub-header. Below the header, it says 'Purpose: In this section, you will define your properties and classify them by type and other attributes that can be used to filter the reports.' and provides a checkbox to 'Check here if the following section does not apply to you.' On the right, there is a 'WELCOME, FACILITY TEST USER' message with a 'Pay for your survey here' link and a progress bar at 22%. Below that is a 'SURVEY LINKS' section with links to Property Info, Property Demographics, Property Areas, Occupancy and Use, Property Operating Expenses, and Utility Consumption / Waste. At the bottom right, there is a 'MEMBERS ONLY' section.

Online Data Entry

7. The survey forms are self-explanatory.
8. You can use to edit just one item – they match the excel file 1:1



COST SURVEY
Section A: Organization Info » Organization Demographics



Purpose: Data reported in this section will be used to identify similar organizations and may be used by the participants to filter the reports. Some data reported in this section defines the units of measure or is otherwise used to administer the survey and is not included in the reports (these are identified and your actual data will not be reported). **This section is required.**


☐ Check here if the following section does not apply to you.



[expand all](#) | [collapse all](#)

ABOUT YOUR ORGANIZATION

Organization name and address:  

Type of organization: *  

Ok to share your name? 

 3-6 character acronym to use in the report 

SURVEY LINKS

- ▼ Organization Info
- Organization Demographics
- Staffing Info
- Overall Budgets
- Technology Used
- ▶ Facility Services
- ▶ Best Practices
- ▶ Performance Survey
- ▶ Learning From Others
- ▶ Feedback

Survey forms are grouped by section – click heading to open/close list, click section to load the form

Click the small blue “i” for information about the data to be entered

As you enter data, there will be a little green check as it is saved (short lag)

Cost Survey Home Page – For Excel Template

(The main benchmarking program was traditionally called the cost survey)

6. If you wish to delete a property, use the icon on the list of properties is the top left of the page..
7. Download and upload data with the Excel template by using the buttons on the left.

The screenshot shows the 'COST SURVEY' home page. On the left, under 'MY PROPERTIES', there is a list of properties: 'Organization Info', 'GALLERY - Exhibition C...', 'OFFICE - Office and E...', 'HOME - Historic res...', and 'EVENT - New Wing'. Each property has a trash icon to its right. An orange callout box with the text 'Delete property here' has an arrow pointing to the trash icon next to 'HOME - Historic res...'. Below this list is a red button labeled 'Create Excel File'. An orange callout box with the text 'Click Create Excel File button, wait a minute and then click file link to download template' has an arrow pointing to this button. Below the button is a section titled 'DOWNLOAD AN EXCEL COPY OF YOUR COST SURVEY DATA' with a 'Browse...' button and an 'Upload' button. An orange callout box with the text 'Click Browse to select completed data file and click Upload. Wait until you see green bar on top of page (success) or error message' has an arrow pointing to the 'Browse...' button. To the right of the 'Browse...' button is the text 'No file selected.' Below the 'Upload' button is the text 'Your Upload file: -' with a trash icon. On the right side of the page, under 'COST SURVEY:', there is a 'Welcome to your cost s' message and a description of the survey. Below this is a list of bullet points: '• You may complete th' and '• Each time you comp'. At the bottom of the page, there is a green bar with the text 'SUCCESS: Your file was uploaded and processed successfully. Thank you!'. An orange callout box with the text 'Click Browse to select completed data file and click Upload. Wait until you see green bar on top of page (success) or error message' has an arrow pointing to this green bar.

Delete property here

Click Create Excel File button, wait a minute and then click file link to download template

Click Browse to select completed data file and click Upload. Wait until you see green bar on top of page (success) or error message

MY PROPERTIES

- Organization Info
- GALLERY - Exhibition C...
- OFFICE - Office and E...
- HOME - Historic res...
- EVENT - New Wing

Add Property

DOWNLOAD AN EXCEL COPY OF YOUR COST SURVEY DATA

Create Excel File

UPLOAD AN EXCEL FILE OF YOUR COST SURVEY DATA

Browse... No file selected.

Upload

Your Upload file: -

COST SURVEY:

Welcome to your cost s

This online survey is an i

It contains a series of que

we need to assess trends

The questions are divided

navigation area to the left

- You may complete th
- Each time you comp

appear to indicate th

to click any other bu

SUCCESS: Your file was uploaded and processed successfully. Thank you!

STEP BY STEP Using the Excel Data Template

When first opening, you may need to enable editing or manually recalculate the sheet for data to display (check the site code to confirm)

AutoSave Off FI-FM_rf_export_2019_04_30.xlsx - Protected View - Excel

File Home Insert Draw Page Layout Formulas Data Review View Developer Add-ins Help Power Pivot Tell me what you want

PROTECTED VIEW Be careful—files from the Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View. Enable Editing

E16

	A	B	C	D	E	F	G
1	FM BENCHMARKING SURVEY						
2	DATA TEMPLATE						
3	This survey data template is provided to help you collect and organize your data for the Facility Issues Benchmarking program. You are free to share copies with others inside your organization who are providing or use the data, but copies are not allowed to be shared with persons outside your organization. (Facility Issues © 2019 - for Participants' Internal use only)						
4	Use these worksheets to collect and organize your data. See the "New This Year" Tab for more information.						
5	IMPORTANT: Review the table below and select YES for those items that you wish to upload - data from this file will replace that entire section (and only that section) in the system.						
6		Section					
7		Site code assigned by Facility Issues; for information only.	0				
8		Contact person's email - edits must be made on Facility Issues website.	0				
9		ORGANIZATION INFORMATION	Import This Section?				

NOTE: If you do not see your site code in cell C8 below after downloading data (or if it is showing 0), then press <Ctrl> + <Alt> + F9 keys.

Section	Reviewed
F099	
rlambe@facilityissue	
Import This Section?	

Excel Template – Instructions Tab

The Instructions sheet shows status of data for this file, lets you track data “assignments” and identifies sections to upload

DATA TEMPLATE

Use these worksheets to collect and organize your data. Download instructions: <https://facilityissues.com/link/data-instructions/>

Fields are color coded to identify those that are most important and also new items from last year

showing 0), then press <Ctrl> + <Alt> + F9 keys.

Tips for prioritizing data:
Fields with * in Bold or with dark background are key data items.
Sections highlighted like this are "optional."
Sections highlighted like this are new or revised this year.

List of all the available sections (tabs) with hyperlink to that section

Import data from this file, select YES (in column C) for those items that you wish to import. This file will replace that entire section (and only that section) in the system.

Data Sections:		These columns just for your use				
Site code assigned by Facility Issues; for information only.						
Contact person's email - edits must be made on Facility Issues website.						
ORGANIZATION & DEPARTMENT INFORMATION		Import This Section?	Section Reviewed	Impt. Questions	Percent Completed	Use this column to track who completes each section
A	Section A: Organization Info >> Demographics (Required)	No	No	8	0%	
B	Section B: Organization Info >> Property Staffing	No	No	11	0%	
C	Section C: Organization Info >> General Costs	No	No	4	0%	
D	Section D: Organization Info >> Facility Operations Greenhouse Gas	No	No	3	0%	
PROPERTY INFORMATION		Import This Section?				
	Property Info >> Definitions (For Sections F-K)	Definitions Only	# Properties: 0			
F	Section F: Property Info >> Demographics (Required)	Yes	No	6	0%	
G	Section G: Property Info >> Areas	No	No	4	0%	
H	Section H: Property Info >> Space Types	No	No	0	0%	
I	Section I: Property Info >> Occupancy and Use	No	No	3	0%	
J	Section J: Property Info >> Operating Expenses	No	No	9	0%	
K	Section K: Property Info >> Utility Usage, Waste, GHG	No	No	3	0%	

INSTRUCTIONS

Units

A-Organization

B-Staffing

C-Budget

D-GHG

Property Info

Definitions

F-Property Info

"Guides" show approximate completion by section and let you note status

Excel Template – Organization/Department Tab

Single column for data with definitions adjacent.

Survey topic/question, the units and description of the data to enter.

Link to return to contents tab

Section C: Organization Info >> General Costs					Return to Table of Contents
This section is to collect non-property specific costs and overhead associated with the general property management group, and project costs that have large variation among specific properties from year to year. Report all costs in currency as reported in section A for the reporting period. (OK to round but enter whole number)					
ID	Topic / Question	Your Answer	Units	Clarification	
DATEC	Date you reviewed the data in this section for accuracy *		Date	This shows last review date; prior year's data may have been pre-filled and should be confirmed if last review date > 6 months old.	
PROPERTY MANAGEMENT OVERHEAD & NON-PROPERTY SPECIFIC OPERATING COSTS					
	Are these costs already included in your costs by property?			Do not include in this section any costs already distributed or allocated by property / activity in the operation cost by property section.	
OX_I_ADMIN	Facility Management Administrative Costs *		Curr	Include all levels of internal/external management above FM Supervisors such as Account Manager/Facility Director (pro-rate if responsibilities include non-facility functions such as Fleet management). Include management fees and fixed costs associated with contracted operations that should be distributed across all properties.	
OX_I_SUPPT	Facility Support Function Costs		Curr	Include all non-property specific, non-project specific, support functions such as clerical, accounting, FM call staff, that support the ongoing facilities operation that should be distributed across all properties.	
OX_I_PLAN	Facility Planning and Assessment		Curr	Include non-project specific planning, analysis, and assessment of facilities to develop long range plans and capital renewal/investment programs.	
OX_F_INSU	General Property Insurance		Curr	Include property and casualty insurance costs for your property portfolio; only include amounts paid or charged to budget.	
OX_I_TECH	The cost of all your property-specific information		Curr	Include subscriptions, license fees, use fees, technical support and other costs for use/maintenance of all property-specific systems such as CMMS, CAFM, IWMS, BAS, BMS, EMS, mass notification, smart tracking system, sensors. Include ongoing data	

Enter your data

Excel Template – Property Data Tab

Table with row for each Property – how you organize them is up to you. Definitions are in a separate tab.
DO NOT CUT/PASTE or insert/delete rows

Links to contents tab
and data definitions

Survey topic/questions
and units for the data
to enter.

[Return to Table of Contents](#)

[See Definitions](#)

Section F - Property Info >> Demographics (Required)

[Return to Table of Contents](#)

[See Definitions](#)

All define your properties by facility or by any grouping you wish (section of a building, individual building, group of buildings, etc.) type and other attributes that can be used to filter the reports. Sections G-K will use the same properties for space, cost, occupancy, and other attributes. For more information on the data fields, see the Property Info Definitions tab for clarifications of data fields. You can edit any field and copy/paste (NOT CUT/paste) data from other sheets. The data will be entered into the table below. Most of the fields in this tab have defined selection lists.

PROPERTY IDENTIFICATION								
Property ID	Property Name*	Property Address*	Property Location - Postal code*	Include in Benchmarking*	Number of Days in Service*	Property Nature	Property Setting	Property Type
BLDGID	BLDGNAME	PROP_ADDR	PROP_POSTAL	PROP_INCLUDE	PROP_DAYS	PROP_NAT	PROP_SET	PROP_TYPE
Text	Text	Text	Text	List	Days	List	List	List
OFF	Office Building		13403	Yes	365	Stand alone or single building	Suburban Area	Office/General Admin
LAB	Lab		13403	Yes	365	Multiple buildings grouped together	Suburban Area	Laboratory
SHOP	Shop			Yes	300	Stand alone or single building	Suburban Area	Light Industrial/Shops
CENTER	Central Meeting			No				
ANNEX	Office Annex		13403	Yes	50	A space within a building	Suburban Area	Office/General Admin

Enter your data by row – can use all normal Excel formulas, lookups, and copy/paste from other sheets – NO CUT/PASTE!

Property Info Definitions | **F-Property Demographics** | G-Property Areas | H-Property Occupancy

Property IDs –
SAME ORDER
on all sheets

Enter your data by row – can use all normal Excel formulas, lookups, and copy/paste from other sheets – NO CUT/PASTE!

Clarifications for property data fields

Excel Template – Some Details

ID	Topic / Question	Your Answer	Units	Clarification
OX_F_INSU	General Property Insurance		Curr	Include property and casualty insurance costs for amounts paid or charged to budget.
OX_I_TECH	The cost of all your property-specific information systems		Curr	Include subscriptions, license fees, use fees, tech use/maintenance of all property-specific system BMS, EMS, mass notification, smart tracking system acquisition, user training, staff, and contractor; other sections of the survey such as maintenance
CX_TECH	The setup cost of all your property-specific information systems.		Curr	Include all "one-time" costs associated with new above. Include cost of initial data acquisition or not report this cost in other sections of the survey improvements.
CAPITAL INVESTMENT				
CX_BLDG	Capital Renewal *		Curr	All expenditures over and above those in your m required to keep the facilities in reliable operation includes all 1-for-1 replacements but not significant costs for building and building services only.
CX_IMPRV	Capital Improvements		Curr	All expenditures the change the size or function benchmarking survey; include additional stacks/densification projects, and
CX_SITE	Site Capital Renewal *		Curr	All expenditures over and above required to keep the site (pavement operating condition for the present
CX_IMPR_SITE	Site Capital Improvements		Curr	All expenditures the change the a utility mains); include reconfiguration development.
TOTAL COSTS				
Include all expenses incurred in				
including exhibitions, education, cooperation				

Property Type *	Property Nature
PROP_TYPE	PROP_NAT
List	List

Field ID	Data Range	Bldg ID
DemogFields	DemogData	DemogRows
AreaFields	AreaData	AreaRows
SpaceFields	SpaceData	SpaceRows
OccupFields	OccupData	OccupRows
OpexFields	OpexData	OpexRows
UtilFields/Bldg	UtilData/Bldg	UtilRows/Bldg
AssetFields	AssetData	AssetRows
WoFields	WoData	WoRows

Template/data items new this year

"Core" or important data items

Optional data items

Named ranges to let you reference external files more easily.

<https://support.microsoft.com/en-us/office/create-an-external-reference-link-to-a-cell-range-in-another-workbook-c98d1803-dd75-4668-ac6a-d7cca2a9b95f>

Questions, Problems, or Suggestions?

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