

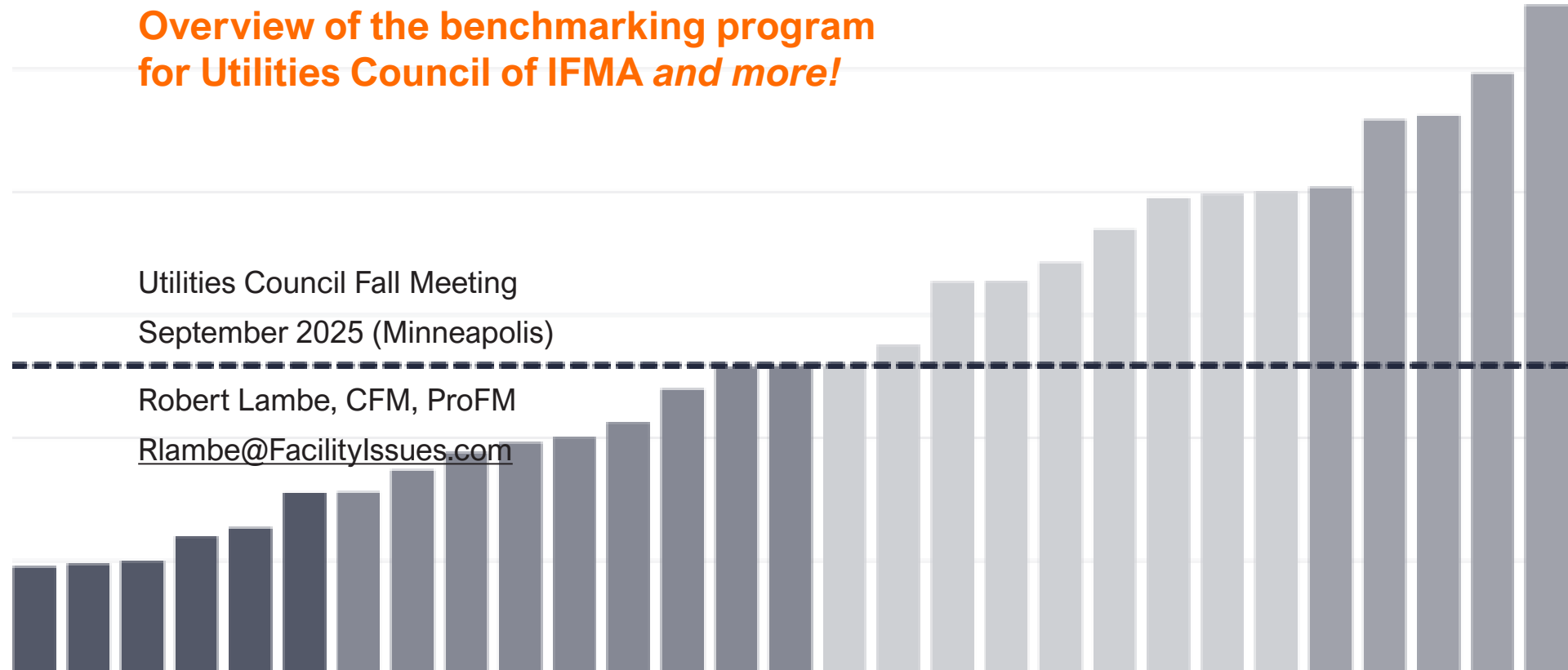


Utility Facility Benchmarking

Overview of the benchmarking program
for Utilities Council of IFMA *and more!*

Utilities Council Fall Meeting
September 2025 (Minneapolis)

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UTILITY FACILITIES BENCHMARKING PROGRAM OVERVIEW

30+ Years of Utility Facility Benchmarking

- 1992 - Sponsored by SRP for western utilities
 - Established structure/content areas
 - Report in Word format
- 1995 - Facility Issues created
 - Benchmarking available to all Utility Council members
 - By 1997 most Council members were involved
 - Moved to the web for data collection and report download
 - Excel reports, Quartile Charts, additional sections added



1992

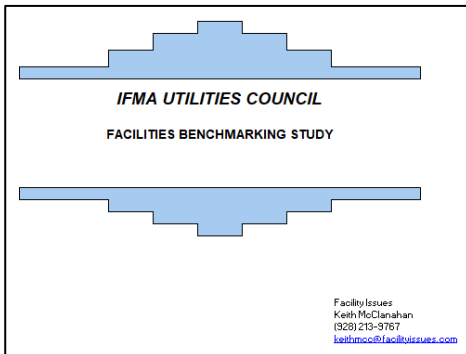
2002

2012

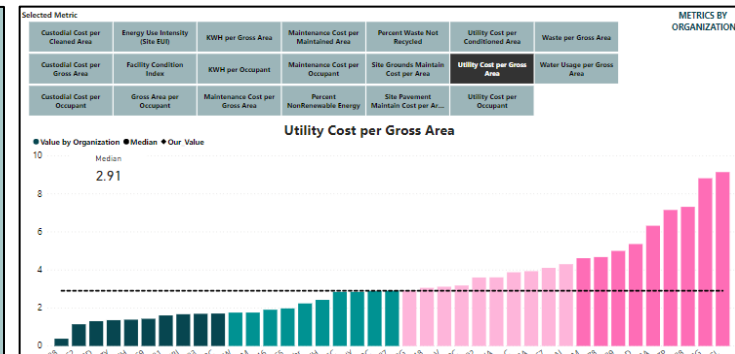
2024

1995

2018



- 2018 - Excel Template for data upload/download
- 2019 – Full transition to Power BI Report
- 2020 - Power BI App Multiple Reports & Trending



1. Program Provides Data & Metrics

Best Utility Industry Data for many Performance Metrics

- 18 Participants serving 60 M customers (with multiple op co's)
- 92 M GSF, \$4 B in Assets, \$837 M TCO

Quantitative and Qualitative Comparisons

- ~780 data points
- Key quantitative performance metrics
 - 25+ at organization level (staffing & practices)
 - 63+ at property level (size, cost, sustainability performance)
- Degree of use of Practices, How SLAs are set and monitored:
 - Custodial operations
 - Maintenance operations
 - Space management
 - Safety practices
 - Energy/water/waste conservation/management

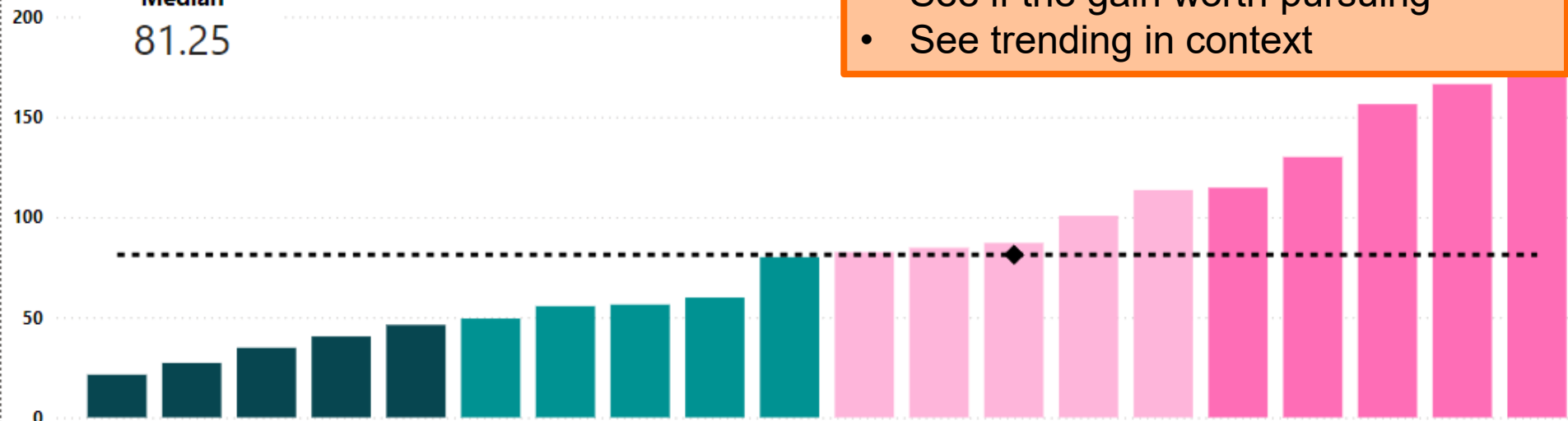
Key Metrics Charts to Facilitate Review

Energy Use Intensity

● Organizations' Value by Quartile ● Median Value ◆ Our Value

Median

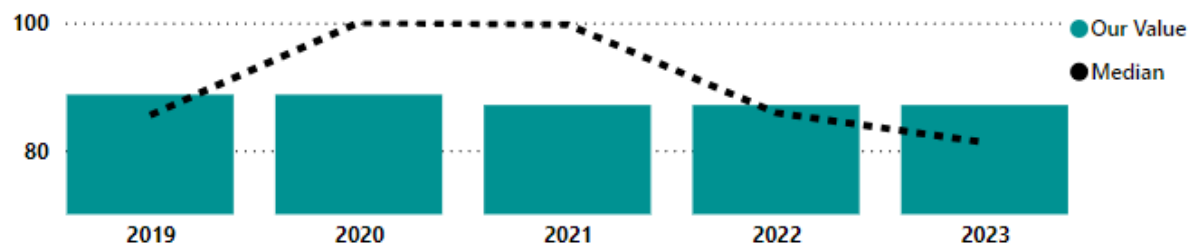
81.25



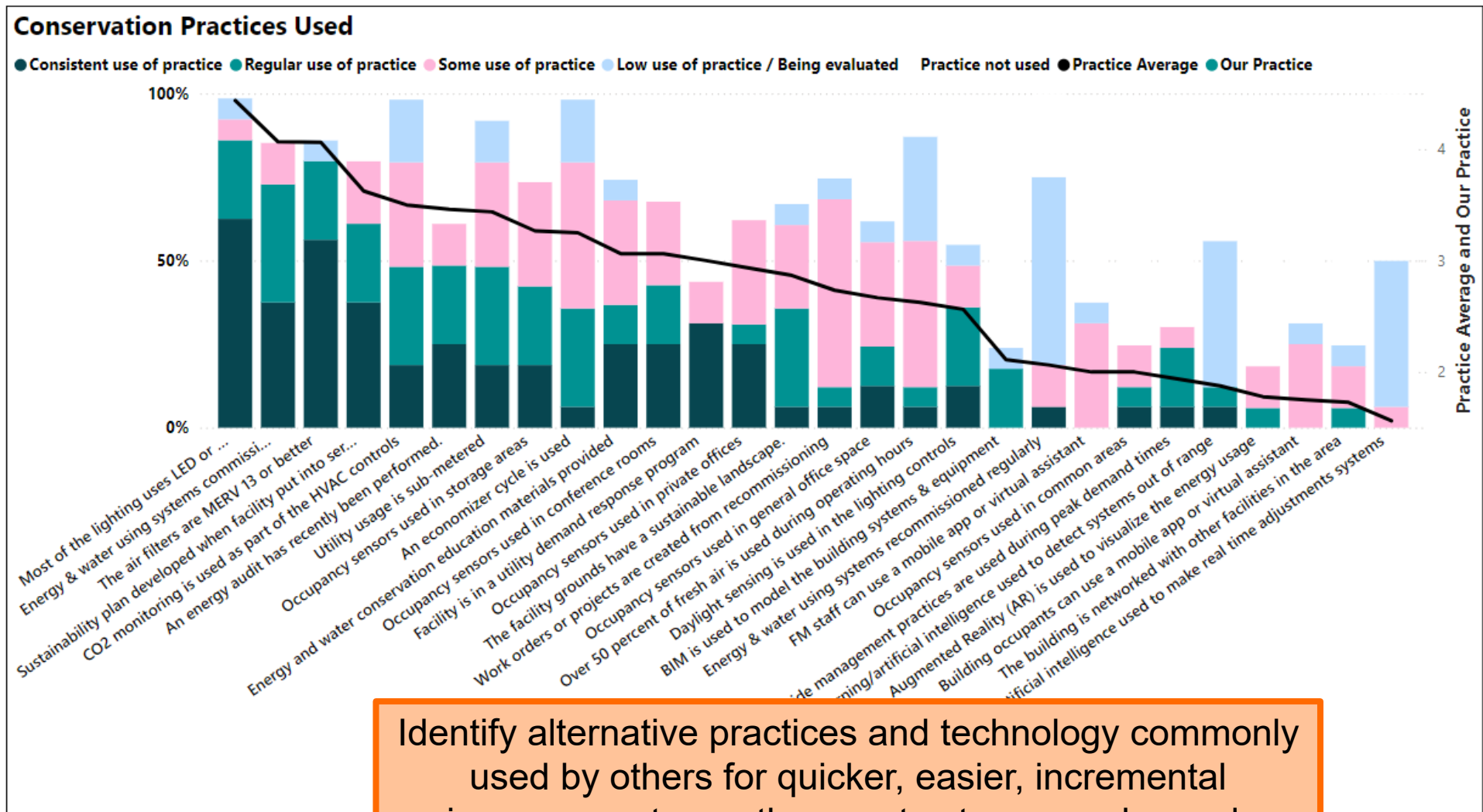
30 Second Review:

- Select metric of interest
- Assess your performance in context
- See if the gain worth pursuing
- See trending in context

Trend: Our Value vs. Median



Comparison of Practice Adoption Levels



Identify alternative practices and technology commonly used by others for quicker, easier, incremental improvements - or those not yet commonly used.

2. Program Includes Process and Guidance

Coordination of the benchmarking process

The Value of Benchmarking:

- *Part of an overall performance metric program*
- *Draws on actual performance data for forecasts and “what-ifs”*
- *Benchmarking data provides context → identifies the current high/low data values for many metrics*
- *Quantify the opportunity of getting to “top quartile”*
- *Participants contribute to raising the bar for everyone!*

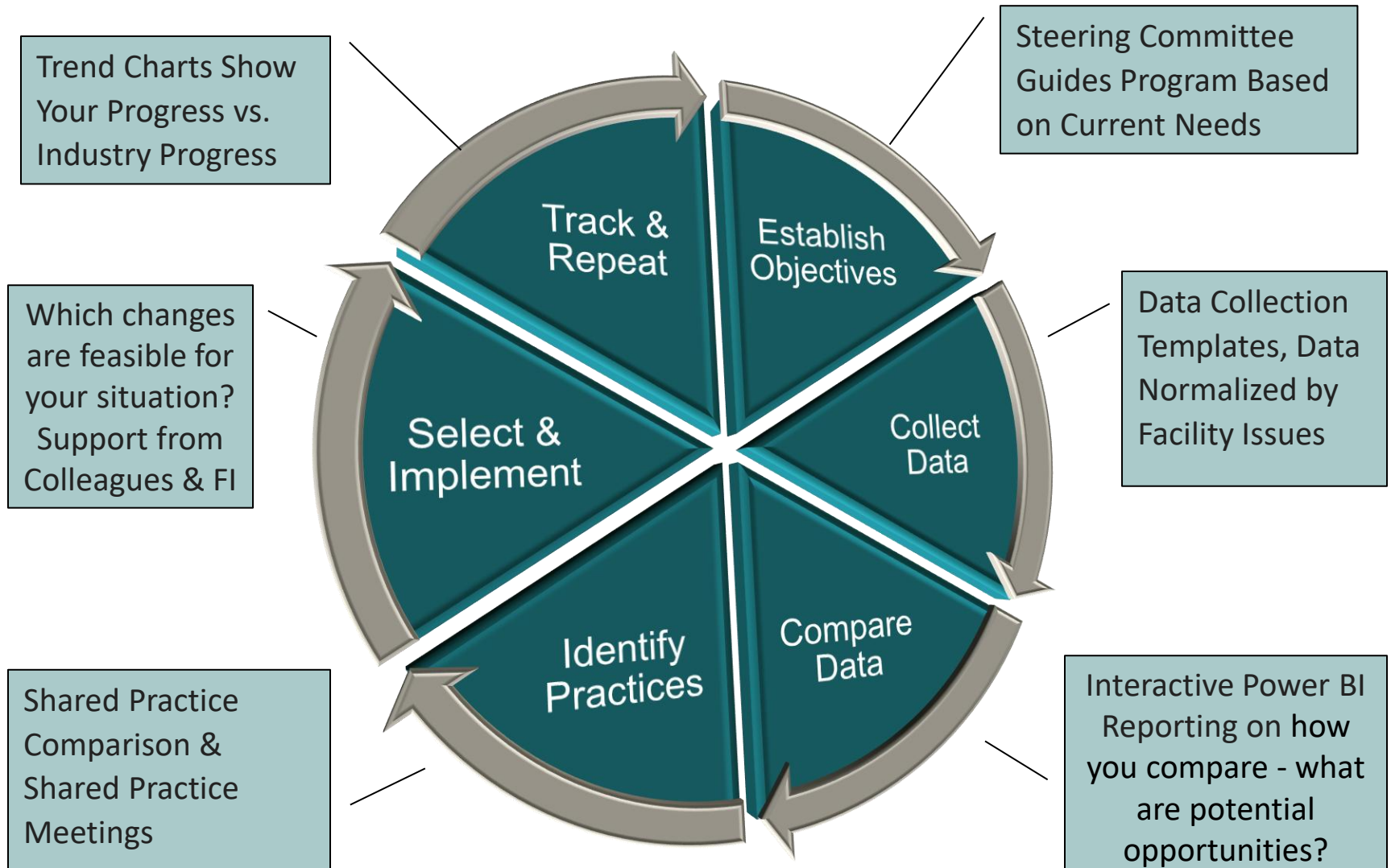
Technical support with 1:1 as needed

- Additional support if desired

Educational presentations, whitepapers, and tips

- (Next page)

The Benchmarking Process

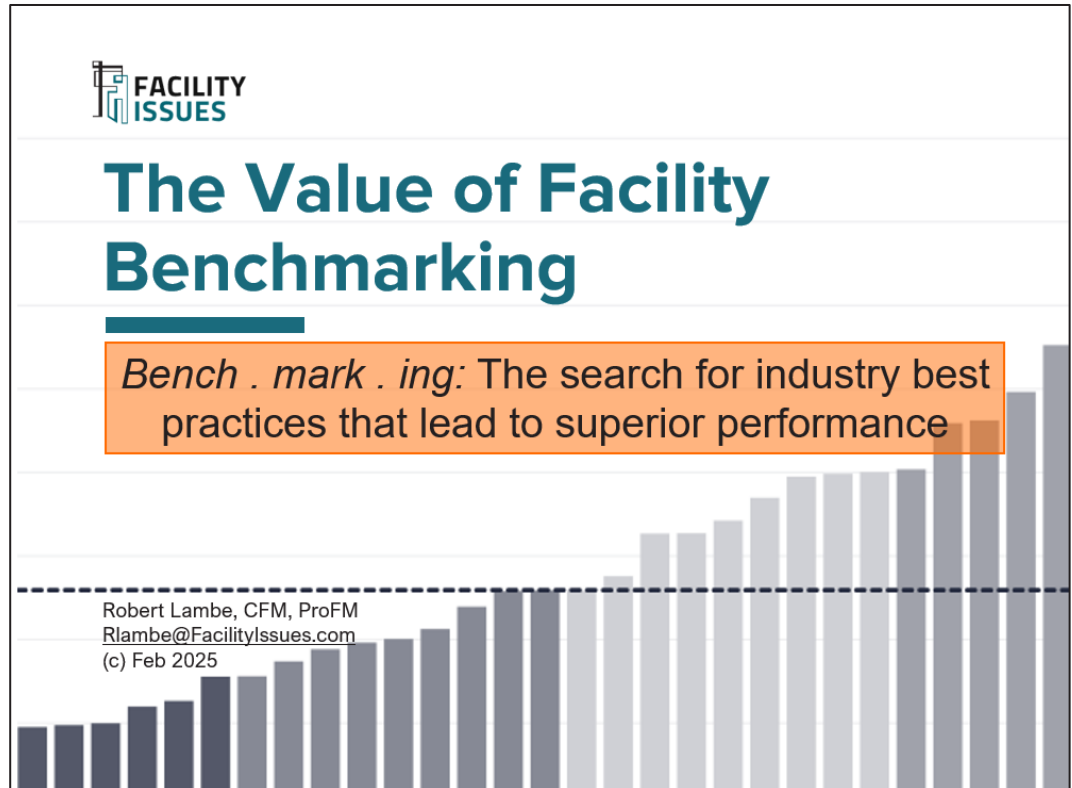


VALUE OF FACILITY BENCHMARKING: <https://facilityissues.com/facility-benchmarking-process/>

New Reference Guide

Tips on getting value from each part of the process

- Identify key information
- Focus on most relevant data
- Create action plan based on your situation



Download: <https://facilityissues.com/get-value-from-benchmarking/>

Example Action Matrix: Performance vs. Objectives

Action Plan: Specific actions (policy change, investment of \$, effort...)

- to achieve desired performance improvement (or address identified deficiency) over specified time period.

Want to be →				
Are ↓		Leader	Competitive	Not Priority
	Leader	Document & Celebrate	Document & Celebrate	Evaluate Resource Allocation
	Competitive	Incremental Improvements & Evaluate	Document & Celebrate	Manage by Exception
	Struggling	Evaluate Radical Changes	Incremental Improvements & Evaluate	Manage by Exception

3. Shared Practices & Lessons Learned

Monthly Shared Practice meetings (Teams)

Associated Monthly Shared Practice surveys

- Supplement traditional group polls
- Results presented with more structure than email lists

Everyone working at a utility company is welcome

- Signup for monthly notices – form at bottom of this page:
<https://facilityissues.com/utilities/>

Discussions on Topics of Interest

Suggestions for
2026 topics?

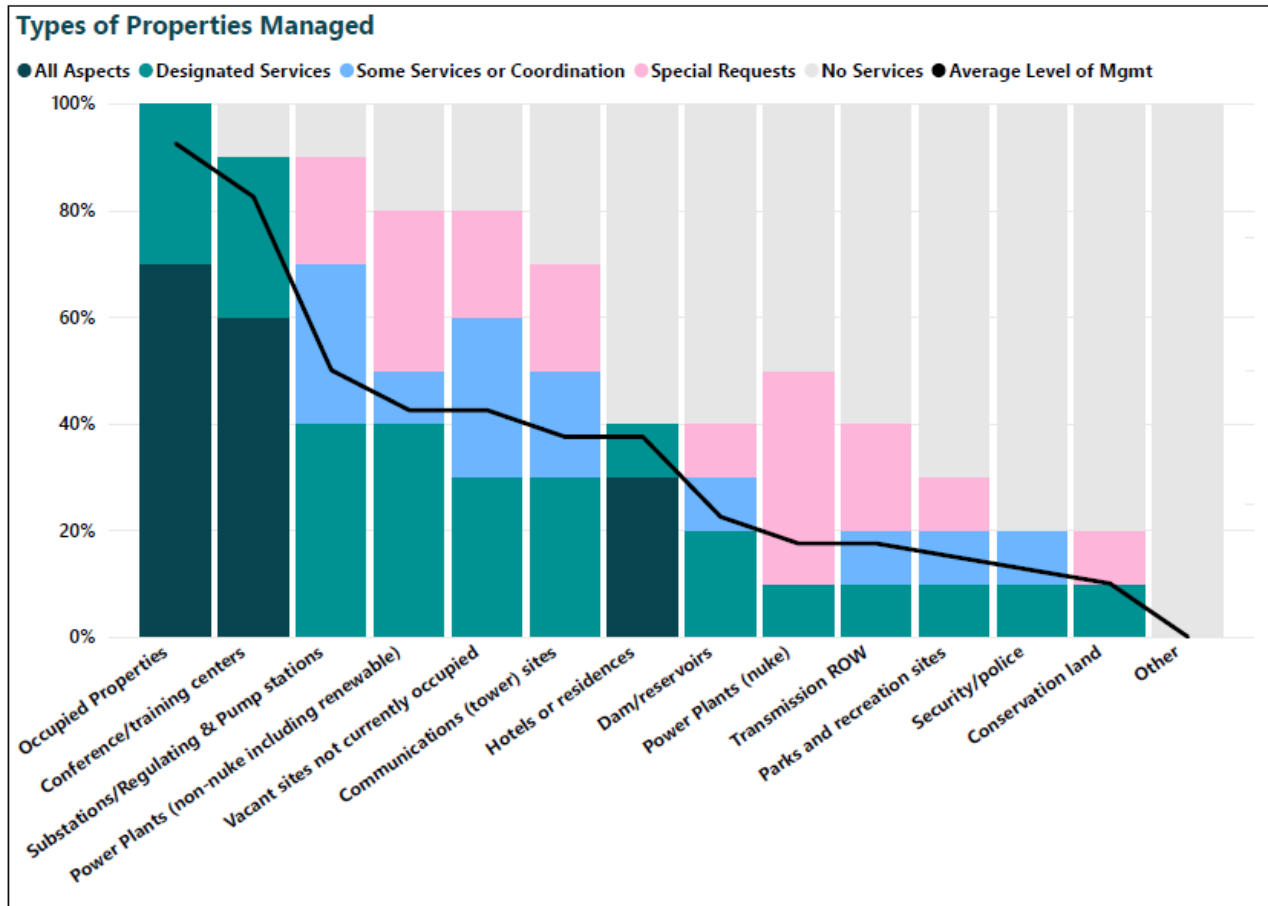
Monthly Shared Practices & Networking Meetings / Surveys

	2025 Monthly Survey / Shared Practice & Networking Topics
Jan	No meeting
Feb	Getting Value from Facility Benchmarking
Mar	The Range of Services Your Department Provides
Apr	Case Study of Matterport Digital Twin Technology at SRP
May	Live Help Session on Your Data Assembly Questions
Jun	AI in Utility Facilities Management
Jul	General Discussion of Your FM Metrics Reporting
Aug	Safety: Roof, Electrical, and More
Sep	No meeting – World Workplace
Oct	TBD
Nov/ Dec	Discussion of Emerging Issues

Discuss emerging issues
and how others are dealing
with them

Calendar: <https://facilityissues.com/utilities/schedule/>

Example Shared Practice Surveys



Which products used?

Archibus

Archibus (SCE) and Corrigo (JLL)

Currently on Hippo FM which is no longer supported.
Transitioning to Eptura on August 1, 2025.

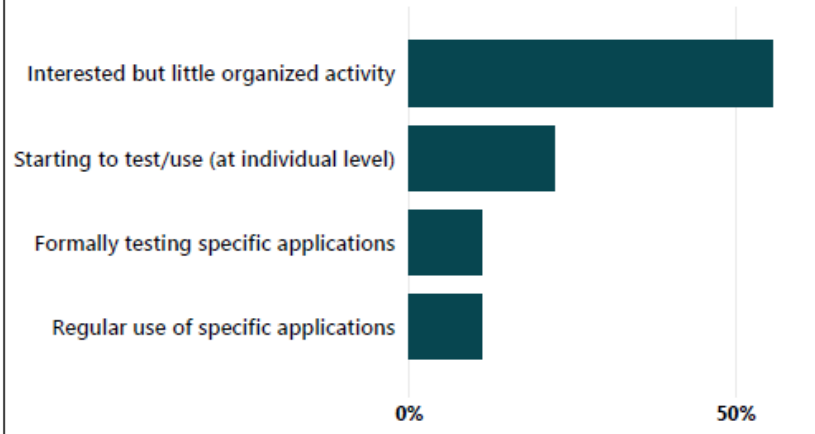
Evolve

Evolve FM's CMMS Module (in conjunction with their CAFM module)

FM:Systems

Example Shared Practice Surveys

Adoption of AI



Company Restrictions on Use?

Yes. Cannot upload or include in prompts any company data/file/non-public info.

Yes, we must use Microsoft CoPilot and other AI tools are subject to IT approval

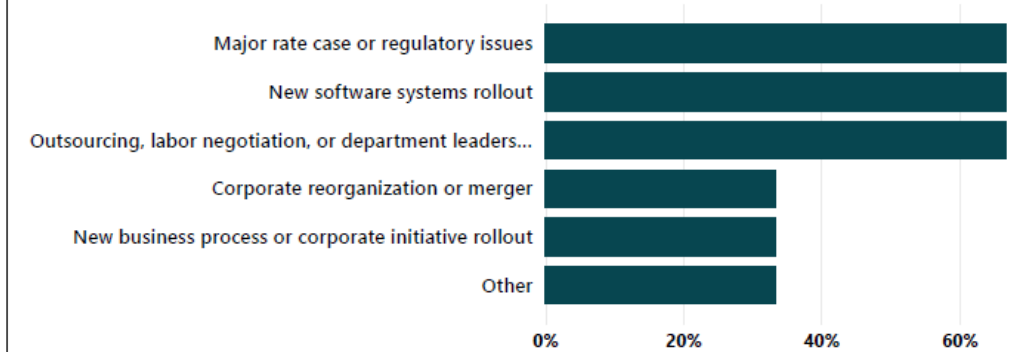
Yes, it must adhere to company's guidelines and pass review by IT department.

Yes

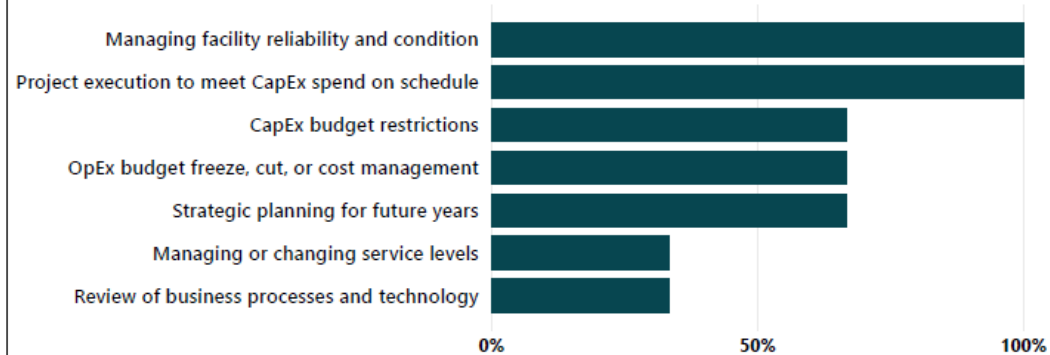
Unsure

no not that I am aware of

Major special activities going on



Current organization/department priorities and areas of focus



4. Networking

Utilities Council has meetings Spring & Fall

Benchmarking group has meetings Winter & Summer

- EUG & WUG meetings (east and west US)
- Small group format
 - Discuss activities currently underway at each company
- In-person, hosted by a utility and includes facility tour(s)

April 2025 EUG Meeting (Houston – CenterPoint)



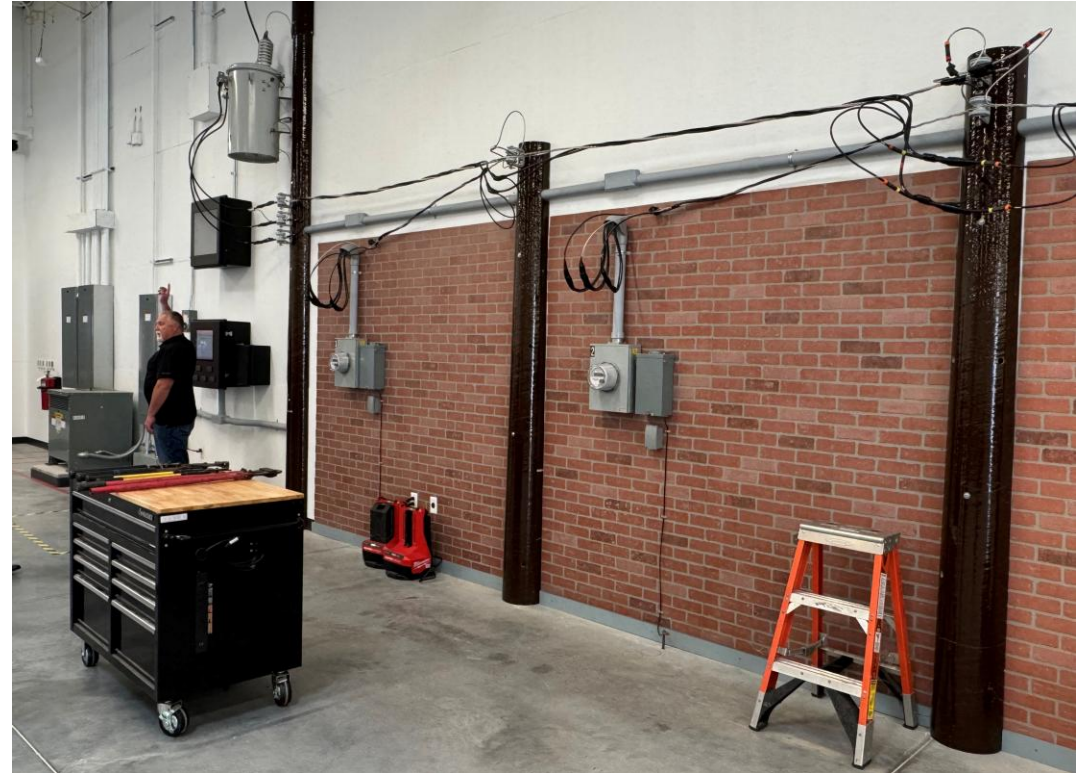
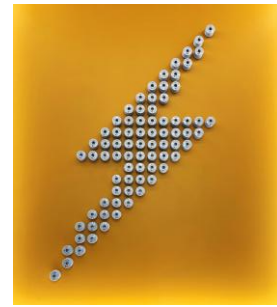
Some Topics of Discussion

- Budgets
- Emergency Prep
- Reputation (Storm response)
- Work order systems and tracking
- Capital planning
- Hybrid vs. RTO

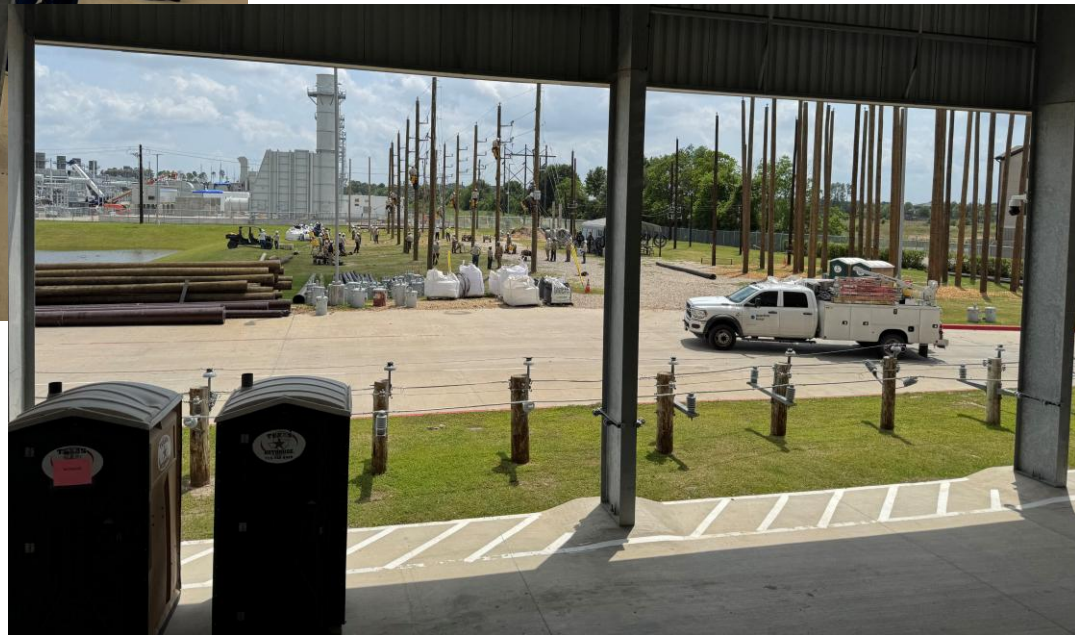
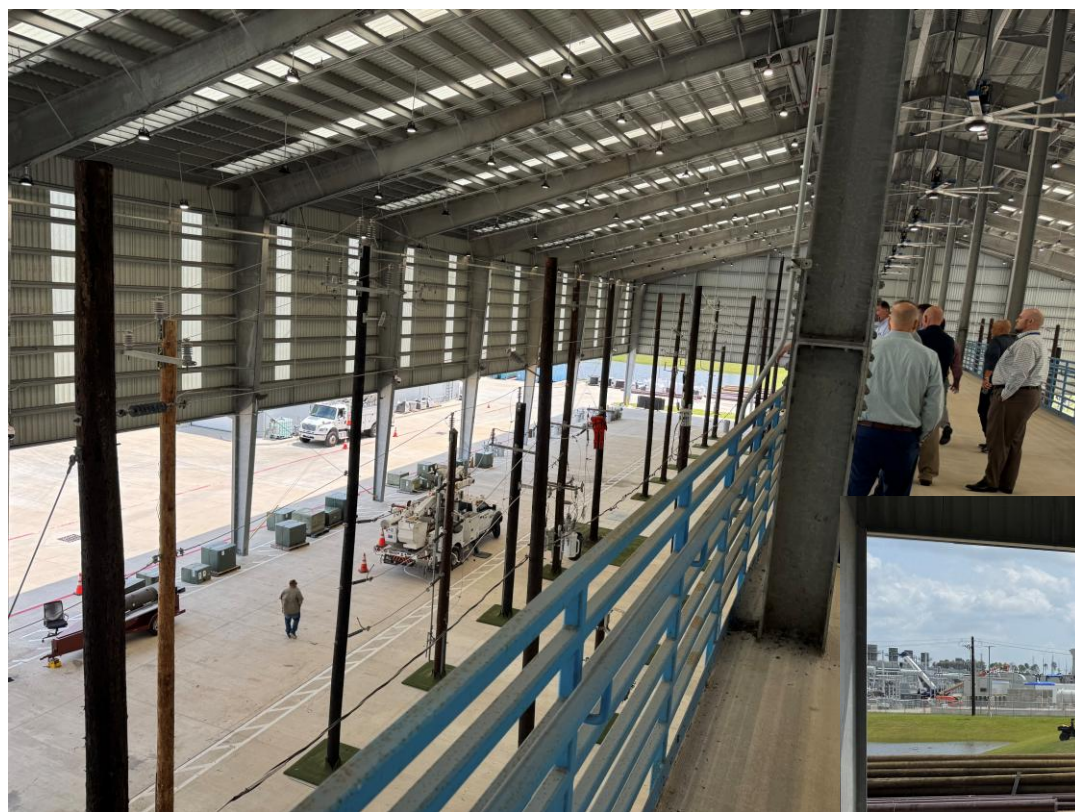
Some Tours

- New Training Center
- Operations Dispatch Ctr



CenterPoint Training Center



CenterPoint Training Center



Schedule

Sep 15-16		IFMA UC Fall Meeting including Benchmarking Overview Minneapolis MN (2 Days prior to IFMA World Workplace)
Sep 24		Shared Practice Meeting: None this month 3:00 pm EST / 12:00 pm PDT
Sep 30		Deadline to submit final benchmarking data adjustments and corrections deadline
Oct 6		Final Benchmarking Report available
Oct 16-17		EUG Meeting Connecticut – Eversource
Oct 22		Shared Practice Meeting: TBD 3:00 pm EST / 12:00 pm PDT
Nov 12		Benchmarking Report Review 3:00 pm EST / 12:00 pm PST (Instead of Steering Committee Meeting)
Dec 3		Shared Practice Meeting: Discussion of Emerging Issues 3:00 pm EST / 12:00 pm PST <i>*Note* 1 week later than normal due to Thanksgiving</i>

MAKING BENCHMARKING EASIER

Wish List: What Do We Want in Benchmarking?

Easier

- Here is the data I have – just use it
- Just tell me the answer without having to learn new software

Faster

- < 4 hours to load
- Answers on demand (preferably by asking on my phone)

More Detailed / More Flexible

- Answers to the question I need, when I need it
- Able to get quick answer or custom chart emailed to me

More For Me

- Help me draft an action plan based on my (changing) priorities
- Let me use this data for other things I have to do

Lower Cost

- Maybe we can get more value instead...

AI is at the Adoption Point

What if we could have automated helpers (related to benchmarking)?

- Can take our data and benchmark easier and faster?
- Can analyze it easier for trends, relationships, problem detection?
- Can we use it for scenario planning, forecasting, and “what ifs” questions?

What would we want the helpers to do?

How do we manage them?



Automated Helpers?

AI Assistants (Agents) – Have a team of benchmarking assistants:

- Ask the benchmarking data questions (analyst)
- Get assessment of our organization (researcher)
- Draft and discuss recommended actions to consider based on selected priorities or weak performance areas (consultant)
- Get help compiling our data (analyst)
- *What else ?*



Key Issues Being Tested in AI Benchmarking Pilot

Data Security/Quality: Keep benchmarking data private

- Use “middleware” to secure our data

Intellectual Property Protection Our patent-pending Neural Engine and IP Vault provide comprehensive security for institutional content. We implement advanced encryption, secure multi-level file storage, and sophisticated content anonymization—achieving 99.99% multi-tenant isolation and 99.7% unauthorized access prevention.

- Limit some queries to only using our data to avoid internet “noise”

RAG, or Retrieval-Augmented Generation, is a technique that enhances large language models (LLMs) by allowing them to access and incorporate external data sources, improving the accuracy and relevance of their responses.

Ease of Use: Specific assistants for specific purposes

Quality of Results: Assess the sensibility of the results

How Might AI Improve Benchmarking

Help with the facility benchmarking “wish list” of easier, faster, more useful, etc.

Charts	➡	Conversations
Manual	➡	Semi-Automated
Descriptive	➡	Proactive
Standard	➡	Customized
Cyclical	➡	Instantaneous
Incremental cost	➡	Foundational value (no less expensive but supports other activities?)

Next Steps for AI Benchmarking Pilot

Start Beta Testing 2025 Q4

- Query benchmarking data
- Benchmark my organization
- Provide draft action plan based on my benchmarking

Define Options for 2026 Program

- How to best incorporate?
- Participation options?
- Participation requirements?

Identify & Develop Additional Capabilities

Interested in Participating? <https://facilityissues.com/utilities/ai/>

AI as “Thought Partner” for Benchmarking

Draw on the capabilities of both approaches to gain better insight, make more informed decisions, and drive meaningful improvements

Capabilities of AI

- Rapid data review
- Respond to custom questions
- Automate routine tasks

Value of Benchmarking

- Provides robust data grounded in current, real-world practices
- Allow visibility of source data
- Good charts & graphs

AI reviews data and provides answers in real time)



Benchmarking provides validated data set as part of the foundation

Thank you!

Measurement: A quantitatively expressed reduction of uncertainty based on one or more observations

Douglas W. Hubbard
How to Measure Anything.

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