

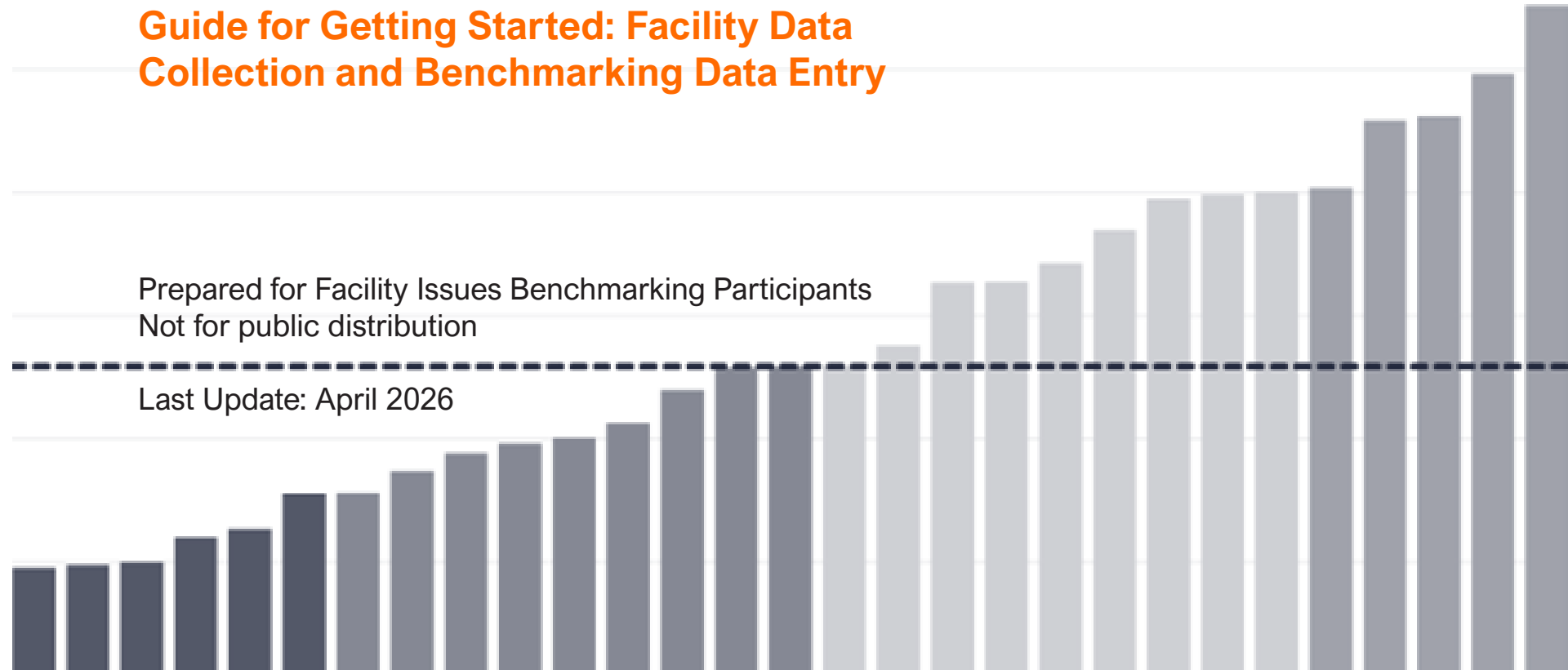


Facility Benchmarking

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

Prepared for Facility Issues Benchmarking Participants
Not for public distribution

Last Update: April 2026



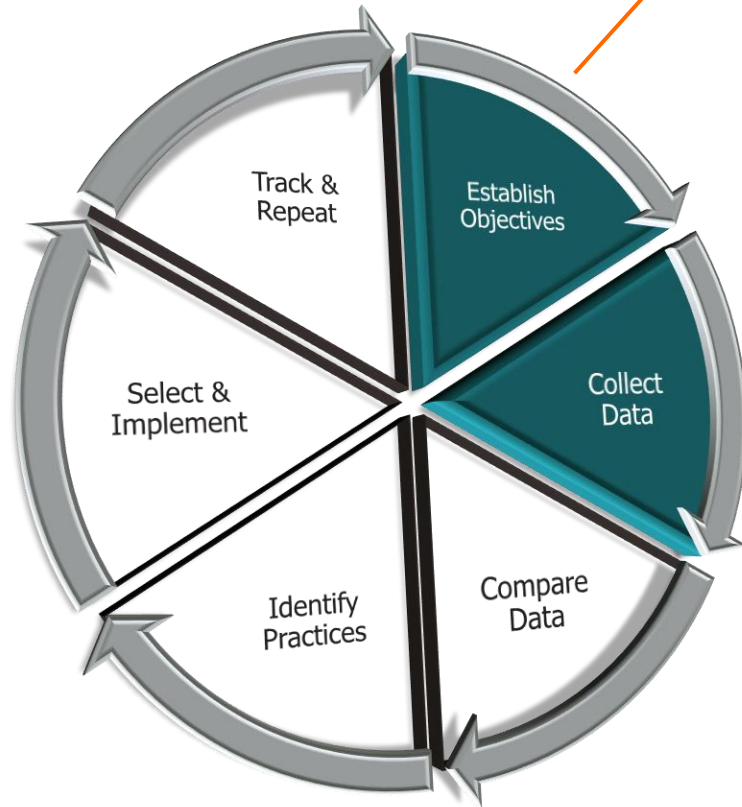
OVERVIEW

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 Accounts

Your organization's primary contact receives your account info as shown below and provides users with the account info needed.

Facilities Benchmarking Account Information

Example Organization

Benchmarking Web/Data Account Information & Roles:

Web Account: There is an account on [FacilityIssues.com](https://facilityissues.com) where your benchmarking data is entered and edited:

The **Web Account Manager** is the main user of the web account use to enter the benchmarking data. *The initial password is shown but Web Account Manager can change their password at any time. Their email is used for any password reset request by any user.

Other **Web Users** can be added by the Web Account Manager (they log in with their own email with full access to the data), typically used for analysts who review and enter the benchmarking data or admins who make online payments.

Website Login Website PW Web Manager Web Manager Email

Benchmarking Reporting Account & Roles:

Reporting Account: There is an account provided by Facility Issues on Microsoft's [Power BI cloud](#) where you access the benchmarking reporting.

The **Report User** provided by Facility Issues is the default method of report access (NOTE: @facilityissues.net, not .com).

Linked Report Users have their business Power BI account linked to the Facility Issues tenancy for easier access to the reporting (requires a Pro or Premium license & our setup).

Site Name Reporting Login Reporting PW

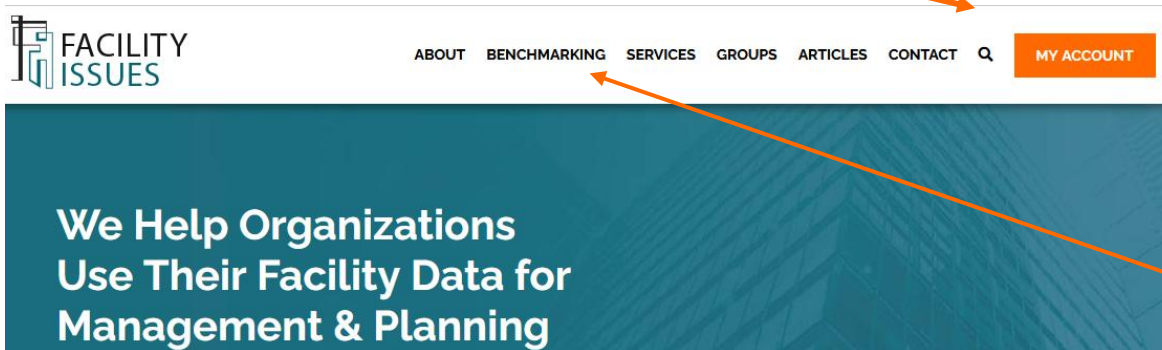
- Use THIS account to enter/download your data <https://facilityissues.com/> (more on following pages)

- Use THIS account for the results reporting (See reporting guide)

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.

The Facility Issues Website

<https://facilityissues.com>

Click on My Account to login or open this admin page



- ABOUT
- BENCHMARKING
- METRICS
- STRATEGY
- ARTICLES
- CONTACT
- MY ACCOUNT

Benchmarking program in which you are enrolled and links to online data forms and participant documents.

Switch to another account with the same email address.

Switch

Can switch between "sites" (if you have multiple)

Log Out

Program(s) Enrolled In

Museums & Cultural Institutions - (last updated: 10/13/2025)
[GoTo Data Forms](#) | [View Documents](#)

Download an Excel copy of your Cost Survey Data

Museums & Cultural Institutions [Create Excel File](#)

Latest Download file: C...._ci_export_2025_08_26.xlsx

Upload an Excel file of your Cost Survey Data

Museums & Cultural Institutions No file selected. [Upload](#)

Manage Account Users [Add User](#)

No account users found

Online Order Account Information

- Dashboard
- Orders
- ...

Hello C.... (not C.... ? [Log out](#))

Your password can be reset when logged in or recovered using the forgot password link on the website. Password recovery only works for the Web Manager email address

Instructions and Tips

- Program Documents & Help:
 - User Guide: [Getting Started & Data Entry](#)
 - User Guide: [MS Power BI Reporting Interface](#)
 - User Guide: [Using Benchmarking Results](#)
 - Tips: [Getting Value from Benchmarking](#)
- Other References:
 - [Cultural Program Schedule](#)
 - [Utility Program Schedule](#)
 - [Compendium of Facility Metrics](#)
- Links to Reporting:
 - [Open the Report](#) (Using account @FacilityIssues.net)
 - [Open the Report](#) (Using your linked business account)
 - Need Help? [Schedule a 1:1 web session](#)

Help documents for data entry and results reports

Links to reporting website

Payment Status

Status: Participating -- Payment received

Your account status

Access the online data forms here

Download & upload your Excel data template.*

Web Manager can allow other users to login to this account.

* See User Guide for Getting Started & Data Entry for step-by-step instructions



For Online Data Entry

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

The list of properties is the top left of the Survey Home 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”
= organization
level data.

All the
properties you
benchmark
are listed and
can be
selected

You have to
delete
properties here

MY ORGANIZATION
Organization Info

MY PROPERTIES

- 0
- B345 - East SC
- HQ - Headquarters
- New - Regional Dis...
- RO - Regional Off...
- SC - Service Centers
- T67 - West SC
- T76 - South Data C...
- Add Property

COST SURVEY

Welcome, Facility Test User
[Pay for your survey here](#)

30%

SURVEY LINKS

- Organization Info
- Facility Services
- Best Practices
- Performance Survey
- Learning From Others
- Feedback

MEMBERS ONLY

MY ORGANIZATION
Organization Info

MY PROPERTIES

- 0
- B345 - East SC
- HQ - Headquarters
- New - Regional Dis...
- RO - Regional Off...
- SC - Service Centers

COST SURVEY

Section F: Property Info » Property Demographics

Welcome, Facility Test User
[Pay for your survey here](#)

22%

SURVEY LINKS

- Property Info
- Property Demographics
- Property Areas
- Occupancy and Use
- Property Operating Expenses
- Utility Consumption / Waste

MEMBERS ONLY

Online Data Entry

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

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

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: ✓ **i**

Type of organization: * ✓ **i**

Ok to share your name? ✓

i 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

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)

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.

Data Sections:		Import This Section?	Section Reviewed	Impt. Questions	Percent Completed	Use this column to track who completes each section
ORGANIZATION & DEPARTMENT INFORMATION						
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						
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%	

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

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.

“Guides” show approximate completion by section and let you note status

INSTRUCTIONS

Units A-Organization B-Staffing C-Budget D-GHG Property Info Definitions F-Property

Units tab lists units of measurement definitions

Select “Yes” for sections to upload

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 – 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, technical use/maintenance of all property-specific systems 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 utility mains); include reconfiguration development.
TOTAL COSTS				
Include all expenses incurred in				

Property Type *	Property Nature
PROP_TYPE	PROP_NAT
List	List

Template/data items new this year

“Core” or important data items

Optional data items

References

Facility Benchmarking Data Entry - How to put your data into the system: Step-by-step guide to getting started (this document)

<https://facilityissues.com/links/getting-started-reference/>

Facility Benchmarking Reporting - How to review the benchmarking reports: Step-by-step guide to the Power BI report interface.

<https://facilityissues.com/links/reporting-reference/>

Facility Benchmarking Using Results - You have the results, now what?: Tips for using benchmarking results.

<https://facilityissues.com/links/using-results-guide/>

The Value of Facility Benchmarking - Combination of benchmarking process overview and practical ways to overcome challenges at each step of the process. <https://facilityissues.com/links/benchmarking-value>

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>