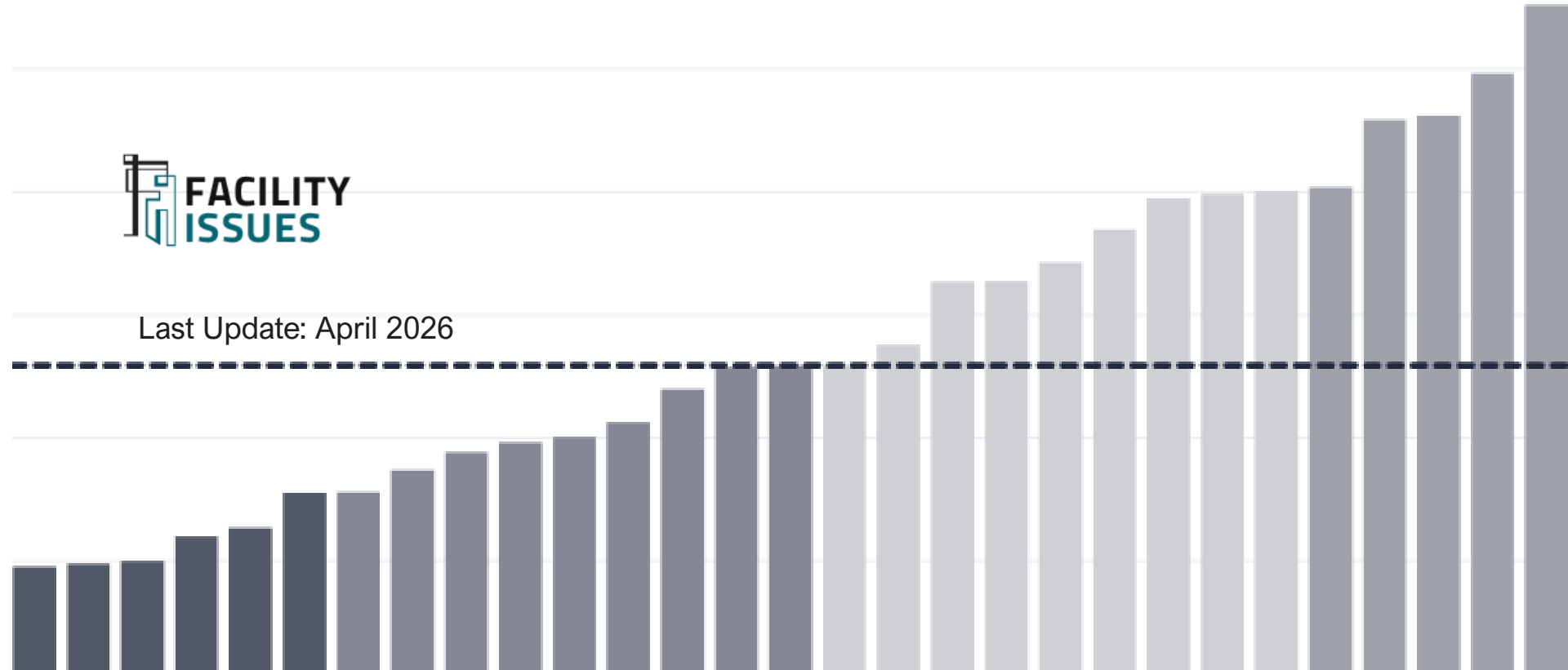


About the Utility Facilities Benchmarking Program



Last Update: April 2026



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- About the Utility Facility Benchmarking Program
- Code of Conduct
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Participating in the Metrics Benchmarking & Reporting

- Benchmarking Program Roles
- Data Template
- Data Reporting

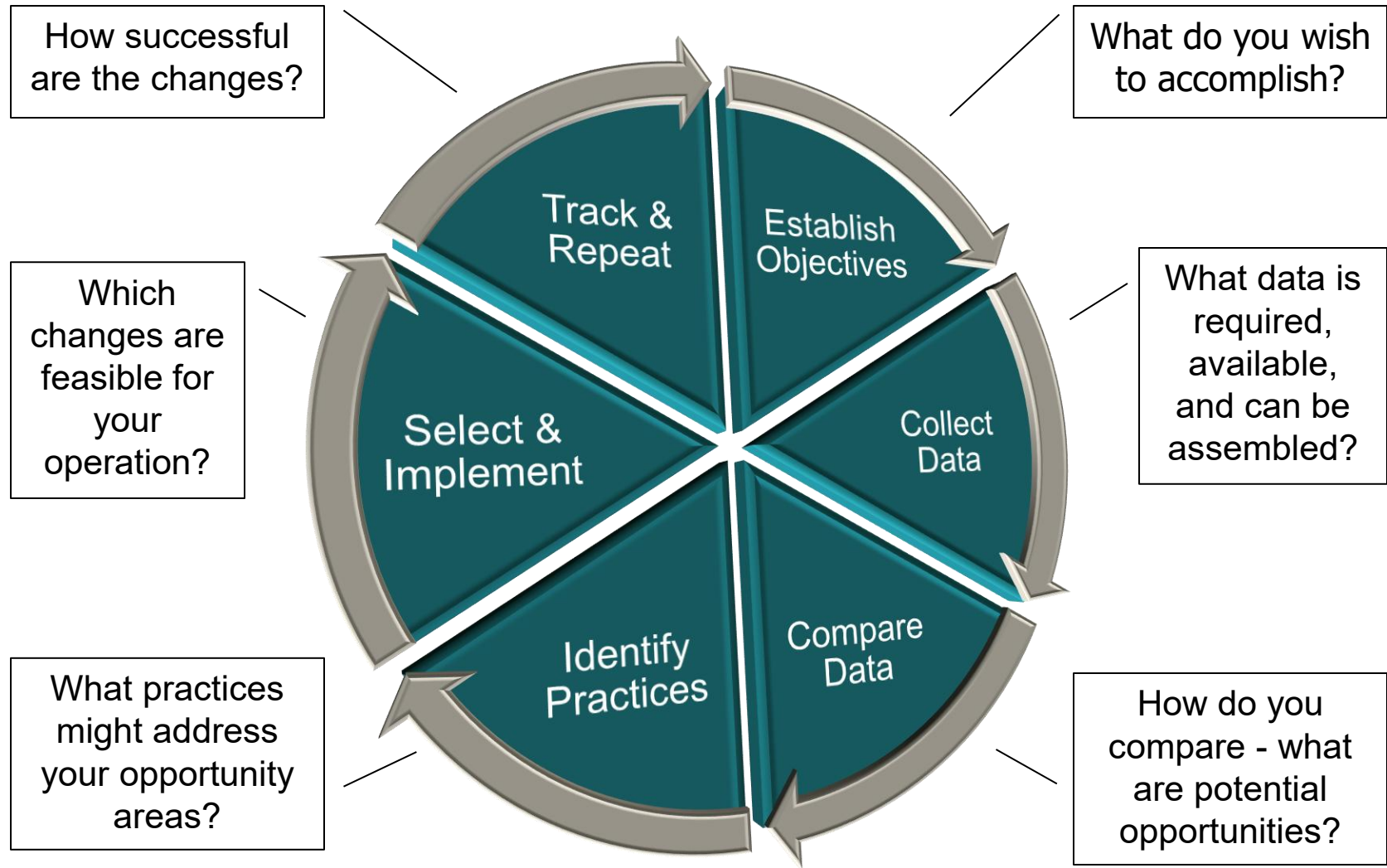
Participating with Peers & Networking

- Shared Practice Meetings
- EUG/WUG Meetings

Help and Support

- References, Service, & Technical Support

The Benchmarking Process



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

About the Utility Facility Benchmarking Program

Endorsed by IAMFA

- International participation
- 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 Teams)
 - Eastern/Western Utility Group Meetings (small group, in-person)

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/utilities/>

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 – Data entry, Getting Started Review 2nd Tuesday April
- ~ Jul 1 – Draft Report available, Review 2nd Tuesday July
- Final Report ~ 2 Weeks After Annual Workshop
- Report Review Meeting 2nd Tuesday November

Shared Practice Meetings

- Monthly, 4th Tuesday of the month Jan - Sep

Steering Committee Meetings (talk about the program)

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

EUG/WUG – Winter/Summer based on hosts' schedule

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

Benchmarking Program Roles*

Account

Primary Contact

- Manage benchmarking account & contacts
- Coordinate organization's benchmarking activities
- Keep others in organization informed of program activities and terms
- Automatically receives all benchmarking communications

Alternate Contact(s)

- Recommended as backup for Primary
- Automatically receives all benchmarking communications

Billing Contact

- Contact for invoicing

Data/Reporting

Web Manager

- Primary user on FacilityIssues.com web account; Can add/remove other users to web account

Web User

- Can login to web account for data review/entry or document access

Reporting User

- One user provided by Facility Issues
- Can have corporate Power BI account(s) linked for direct access to benchmarking reports

Participation

Everyone else in the organization (Associates)

- 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:

Sign up for mailing list:
<https://facilityissues.com/subscribe/>

Description of Roles & Likely Effort: <https://facilityissues.com/wp-content/uploads/2026/06/Utility-Facility-Benchmarking-Roles.pdf>

Excel Template for Data

FM BENCHMARKING SURVEY: Cultural Institutions				
Section A: Organization Info >> Demographics (Required)				Return to Table of Contents
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.				
ID	Topic / Question	Your Answer/Data	Units	Clarification
DATEA	Date you reviewed the data in this section for accuracy *	4/4/2026	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.
Administration				
ORG_NAME	Organization name *	My cultural institution	Text	Used for administration only.
ORG_ID	3-6 character acronym to use on the charts (If you wish to customize your code)	FI	Text	OPTIONAL: If you enter a value, it will be the label used on the charts as your sitecode instead of the anonymous one assigned to you. NOTE: Others will see this also.
ABOUT YOUR ORGANIZATION				
ORG_TYPE	Type of organization *	Cultural-Fine Art Gallery/Museum	List	Select the one category that best describes the primary industry/focus of your organization.
ORG_FM	Where does the facility management organization report? *	Human Resources	List	Select the best match of the top level executive who's organization includes facilities management (and facility projects /other services reported in this benchmarking survey).
ORG_STAFF	Facility Management Staffing Approach *	Mostly contracted by trade/geographic area	List	Select the option that best matches the approach for how you staff your facility maintenance and operations group.
UNITS OF MEASURE				
UNITS	Units of measure *	English Units	List	English units = square feet, acres, gallons, degrees F, etc.; Metric units = square meters, hectares, liters, degrees C, etc.
CURR	Currency *	USD-United States Dollars	List	Select the currency used for your cost data.
YEAREND	Data are for period ending *	12/31/2021	Date	Enter the last day of the 12-month period used for reported costs (MM/DD/YYYY format).
ORG_FY	Fiscal Year end date	12/7/2023	Date	Enter the last day of your fiscal year (MM/DD/YYYY format).



[ABOUT](#)
[BENCHMARKING](#)
[METRICS](#)
[STRATEGY](#)
[ARTICLES](#)
[CONTACT](#)

Program(s) Enrolled In

Museums & Cultural Institutions - (last updated: 04/04/2026)
[GoTo Data Forms](#) | [View Documents](#)

Download an Excel copy of your Cost Survey Data

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

Upload an Excel file of your Cost Survey Data

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

Manage Account Users

test@test.com
[Edit](#) | [Delete](#)

Instructions and Tips

- Program Documents & Help:
 - User Guide: [Getting Started & Data Entry](#)
 - User Guide: [MS Power BI Reporting Instructions](#)
 - User Guide: [Using Benchmarking Reports](#)
 - Tips: [Getting Value from Benchmarking](#)
- Other References:
 - [Cultural Program Summary and Schedule](#)
 - [Utility Program Summary and Schedule](#)
 - [Compendium of Facility Metrics](#)
- Links to Reporting:
 - [Open the Report](#) (Using account @FacilityIssues)
 - [Open the Cultural Report](#) (Using your account)

Excel template makes data collection easy.

- Tabs by data topic
- Data fields, format, and clarifications included

Excel file uploaded and downloaded from website with click of a button.

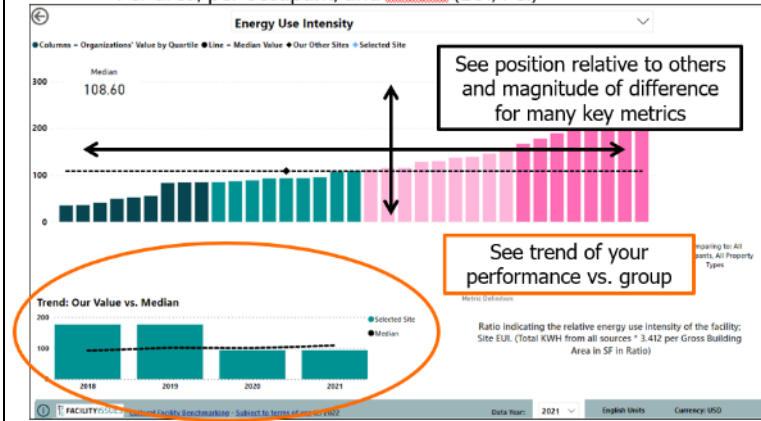
- Update data by section
- Save copy of your file

Quantitative & Qualitative Metrics

Quantitative Data: Space, Cost, Utilities

Charts show relative position (within group and within data range) for a variety of metrics

■ Per area, per occupant, and indexes (EUI, FCI)



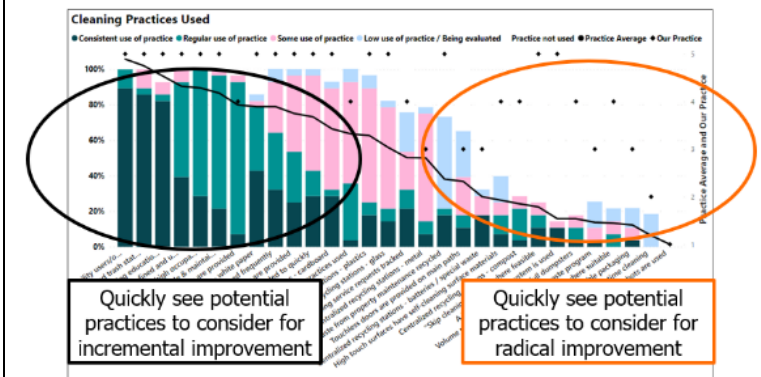
Quantitative metrics provide context & trends.

- Your position vs. peers
- Magnitude of opportunity
- Performance improvement over time

Qualitative Data: Practices & Technology

Charts show degree of use for FM practices & technology by functional areas to help identify desirable change

■ Cleaning, Maintenance, Space Mgmt., Utility Use/Sustainability



Qualitative metrics identify potential opportunity areas

- Degree of use for practices & technology
- Non-cost performance measures

Participating in the Shared Practice Meetings

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

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

Get monthly notices of meetings: <https://facilityissues.com/utilities/> (bottom of page)

Participating in the Eastern/Western Utility Group (EUG/WUG) Meetings

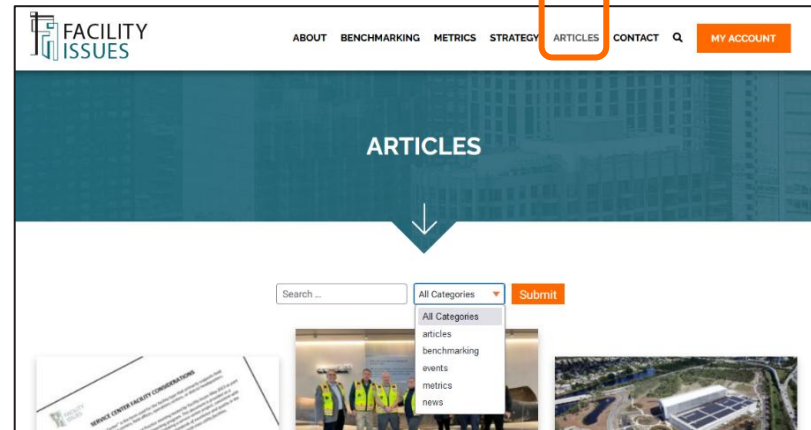
These are 1-1/2 day regional in-person networking meetings hosted by a utility

- This meeting provides a review of the year's program, presentations of things going on at various utilities, and discussion of current issues and facility tours.
<https://facilityissues.com/utilities/eug-wug-meetings/>
- 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 Support

Shared practice meeting notices, general reference articles, and past presentations made at the IAMFA conference, are available on the Facility Issues website.



[Enroll online](#) or schedule a 1:1 call / web meeting to see if it is right for you: <https://calendly.com/lambe/30min>

Phone and email support is available business hours (Eastern Time).
Contact us for custom facility planning & metric support services.

Robert Lambe, CFM, ProFM
315.601.6010
Rlambe@FacilityIssues.com