FACILITY ISSUES

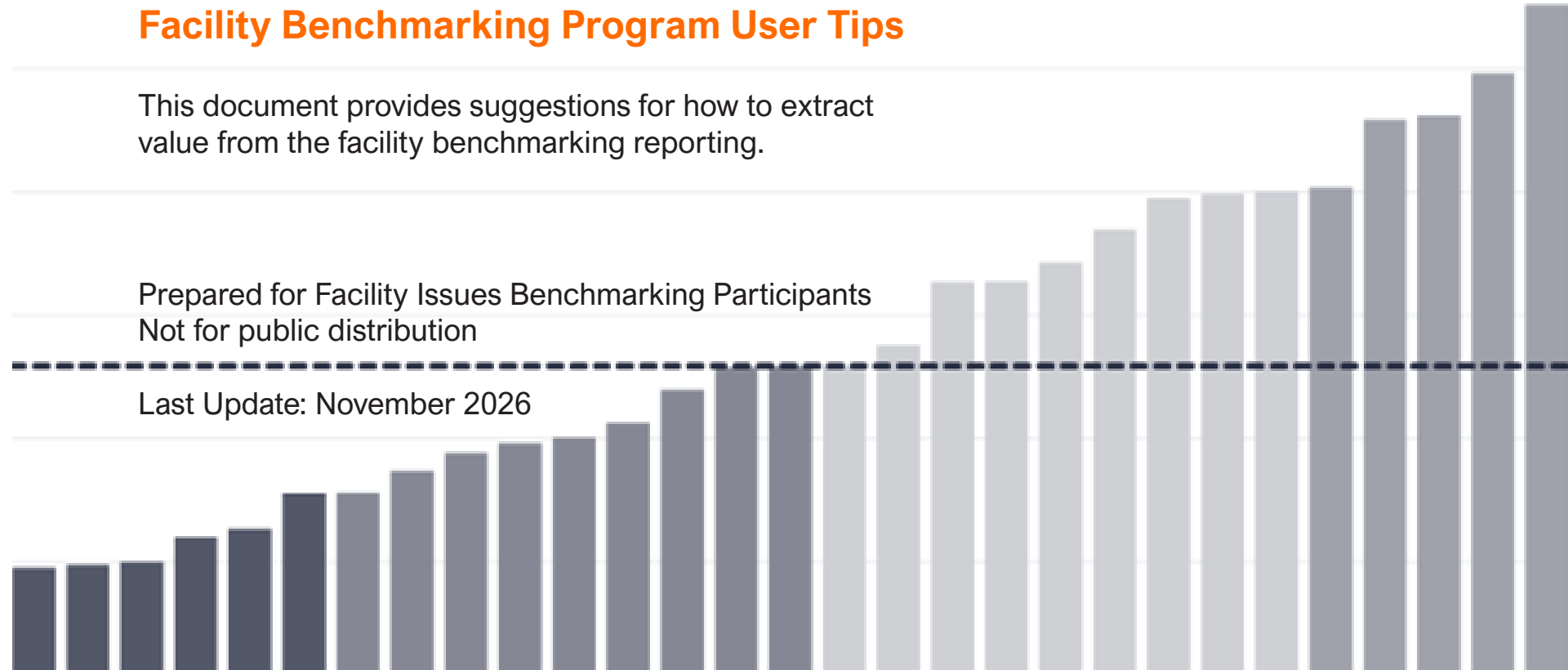
# Using Facility Benchmarking Results

## Facility Benchmarking Program User Tips

This document provides suggestions for how to extract value from the facility benchmarking reporting.

Prepared for Facility Issues Benchmarking Participants
Not for public distribution

Last Update: November 2026



# About This Review

To provide suggestions on how to use benchmarking results

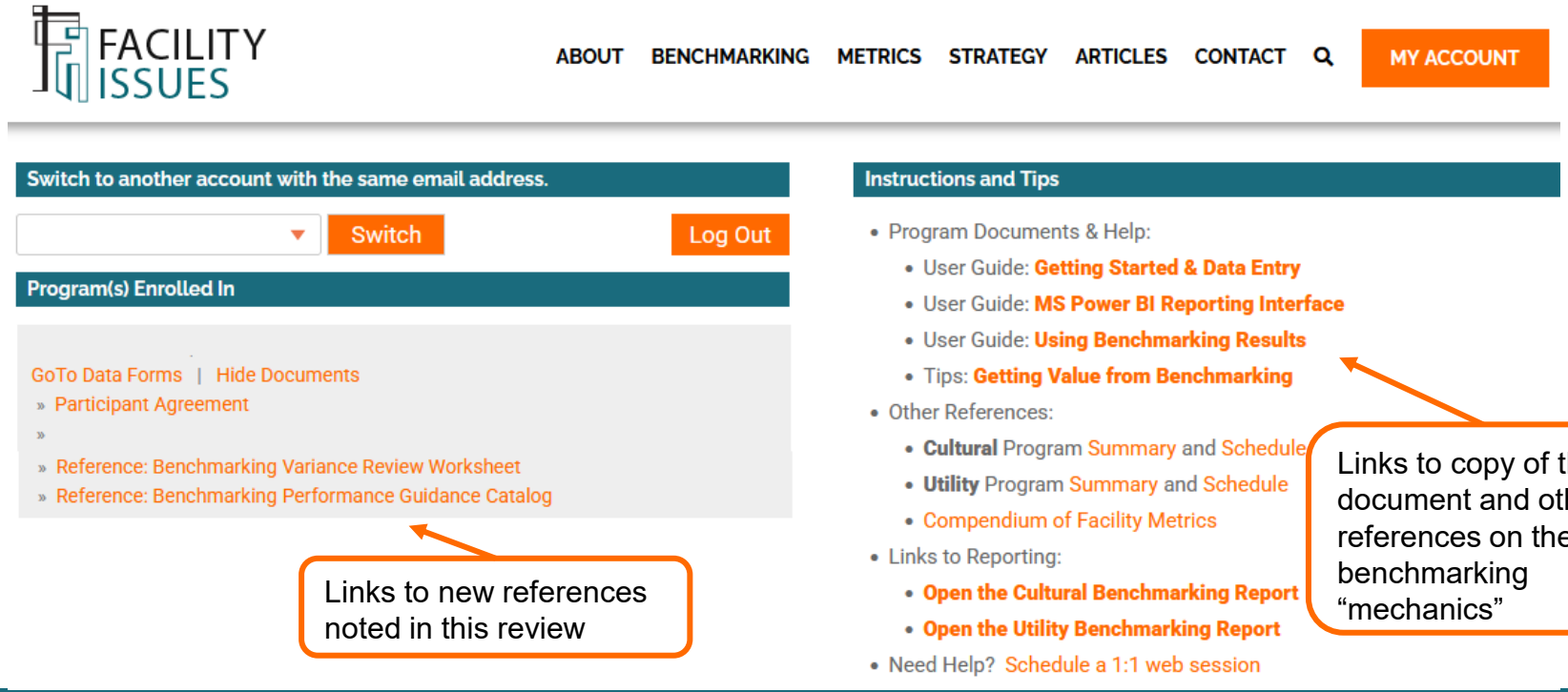
Why Is This Important?

- Get your value from benchmarking
- Draw on the results whether for reference or action
  - Understand areas of relative strength and weakness
  - Document the good performance accomplished
  - Identify areas to review
  - Identify areas that warrant additional inquiry or action

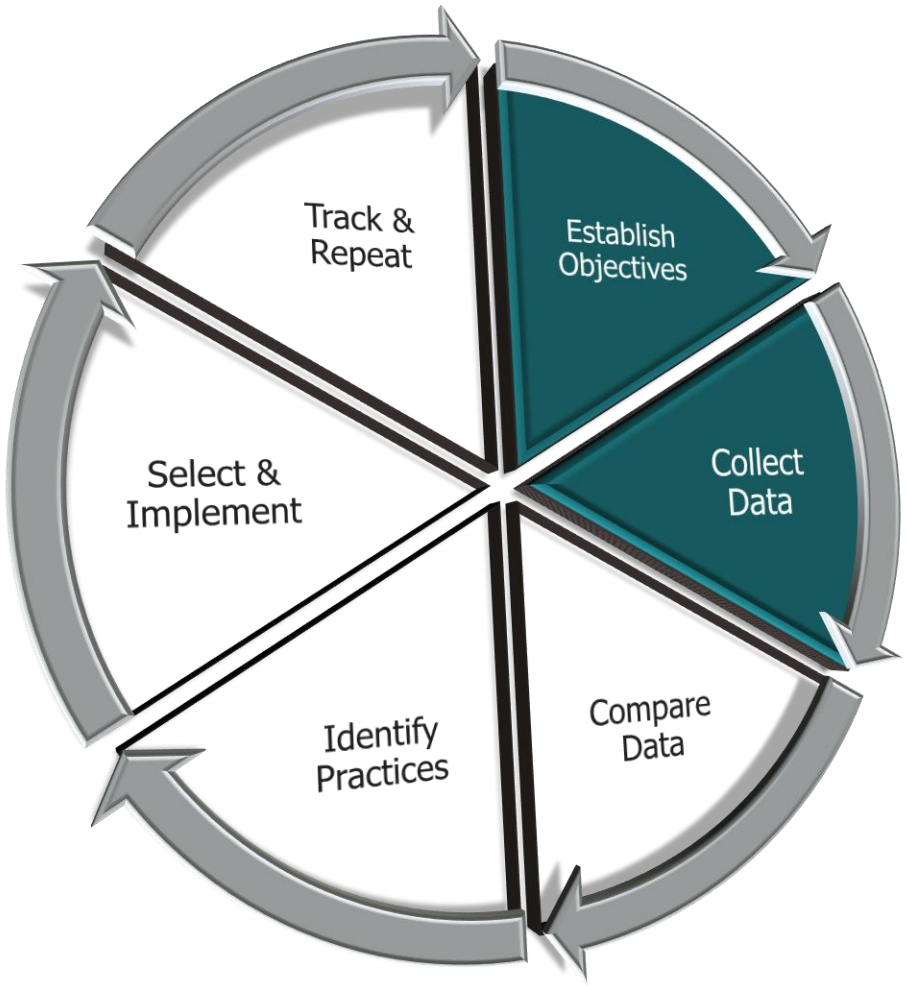
*Key Concept: Use Benchmarking Results as a Diagnostic*

# Agenda

- Recap: Setting Objectives & Data Entry
- Recap: Using the Reports & Comparing Performance w/ Objectives
- Tips for Reviewing Results
  - New Visuals & References Available



# Recap: The Facility Benchmarking Process (Steps 1 & 2)




The first portion of the process was about understanding your objectives and assembling your data.

When reviewing the results, you can also:

- Draft refinements to your objectives
- Assess your data quality

Article on Benchmarking Process:
https://facilityissues.com/facility-benchmarking-process/

# Dimensions of Performance

- Asset Management
  - Condition
  - Reliability
- Cost
  - Capital
  - Custodial
  - Maintenance
  - Security
  - Total
  - Utilities
- Operations
  - Work Management
  - Occupant Satisfaction
- Space & Occupancy/Use
  - Effectiveness
  - Utilization
- Staffing
- Sustainability
  - Energy
  - GHG
  - Waste
  - Water

*and other...*

**Where do you want to stand on each of these?**

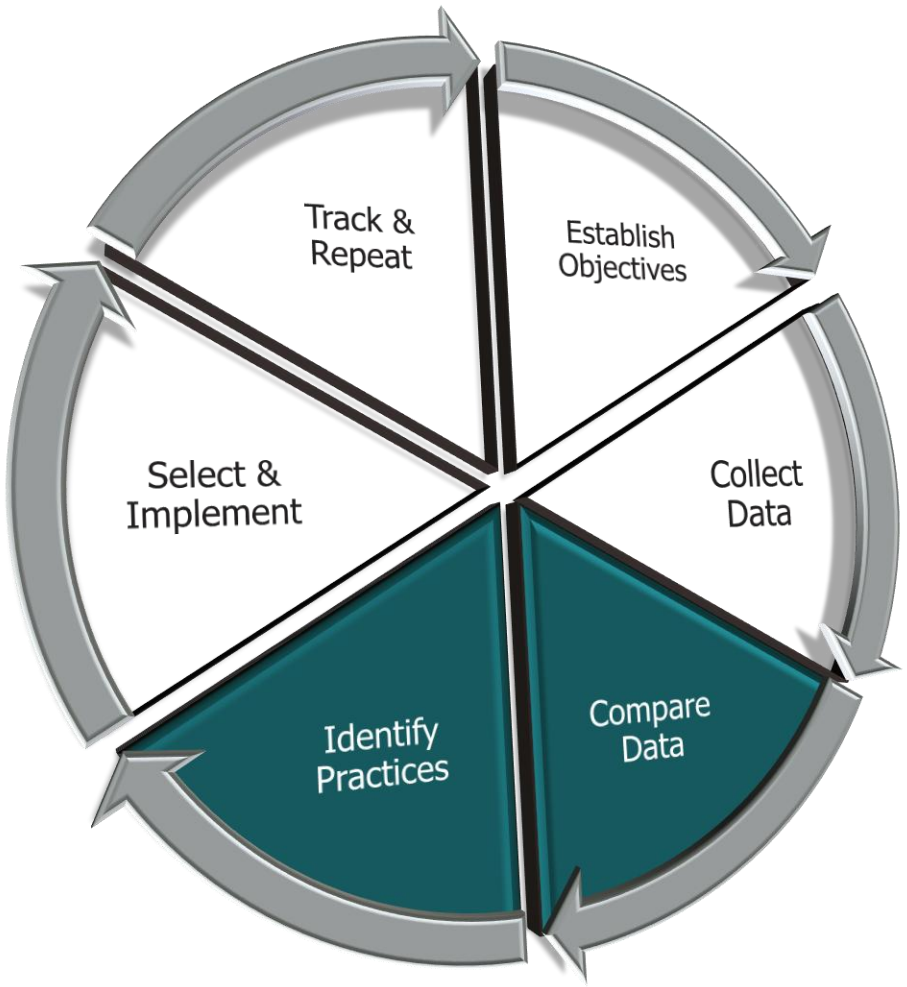
- **Leader** – Have leading edge performance in this area based on quality, quantity, innovation, or impact.
  - Best in Class
- **Competitive** – Have performance that is consistent with others in the industry, prudent, responsible.
- **Not a Priority** – Not concerned with performance in this area right now (focused on other aspects).

# What are Your Organization's Priorities?

| Performance Criteria | Performance Objectives | | |
|---|---|---|---|
| Space quantity & utilization | Best in class | | |
| Space environmental quality | | Responsible, competitive | |
| Facility reliability & resiliency | | | Track but not a Priority |
| Facility quality/appearance | Leader | | |
| Employee wellness & productivity | Leader | | |
| Facility operating costs | | Responsible, competitive | |
| Sustainability | Best in class | | |
| Organization innovation | | | Track but not a Priority |
| FM staff expertise & engagement | | Responsible, competitive | |

Example

# Recap: The Facility Benchmarking Process (Steps 3 & 4)




The next portion of the process was about reviewing how you compare on quantitative metrics and general practices.

When reviewing the results, you can also:

- Assess other data of potential value
- Evaluate current practices and ideas from shared practice meetings

# Set of Power BI Reports Provided

## Property O&M Cost Metrics

- Traditional facility operating cost metrics, maintenance, cleaning, grounds, security, and utilities.

## Property Assets & Space Metrics

- Space and asset related metrics; gross areas, net areas, facility condition index, capital renewal, and some occupancy metrics..

## Property Sustainability Metrics

- Energy, water, waste, and CO2E metrics (Scope 1 & 2 only).

## FM Organization Metrics

- Staffing ratios, service levels, & work order metrics.

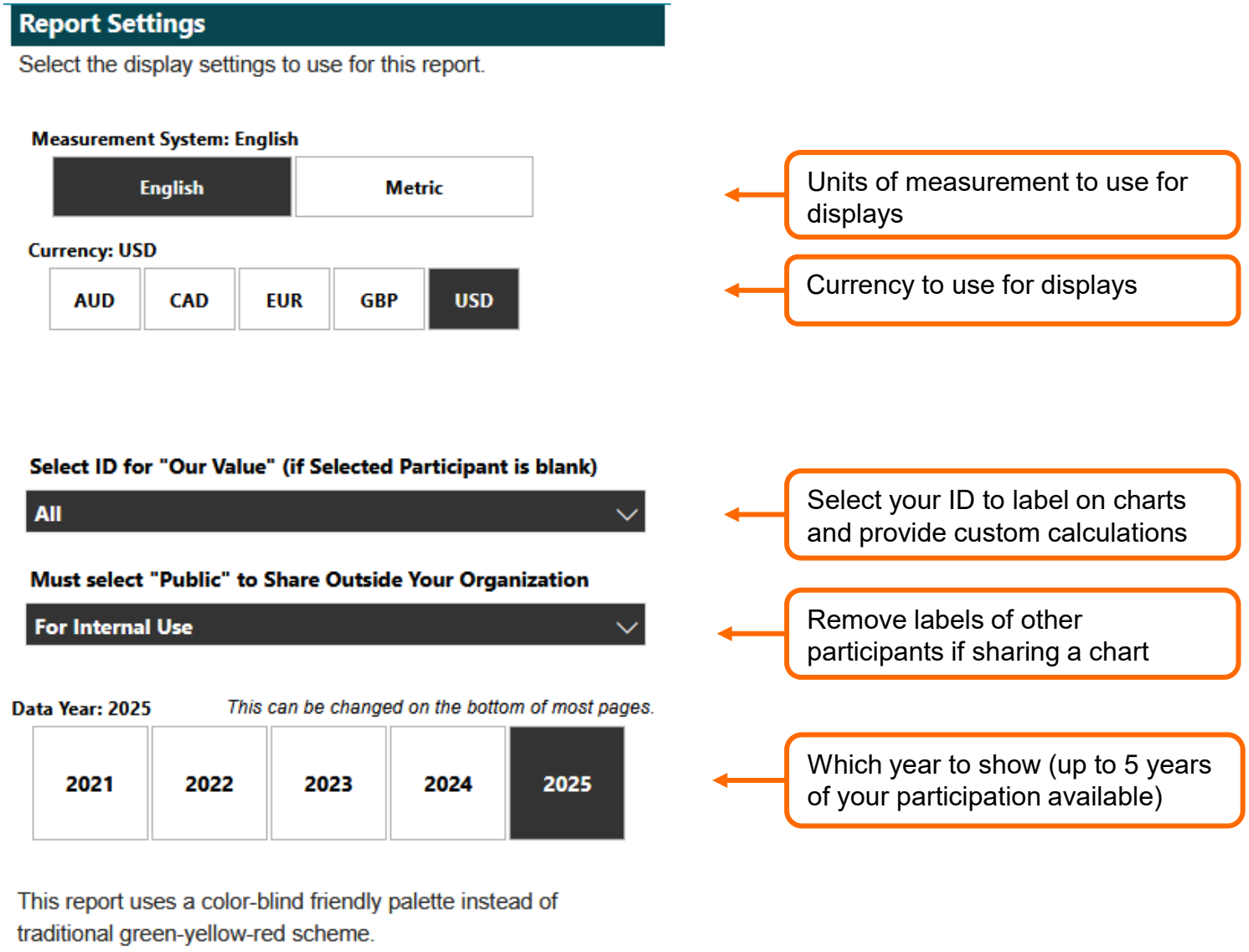
## Results Explorer

- Interface to view summary results, export metrics, compare results distribution by metric, and other trial charts.

## Our Properties

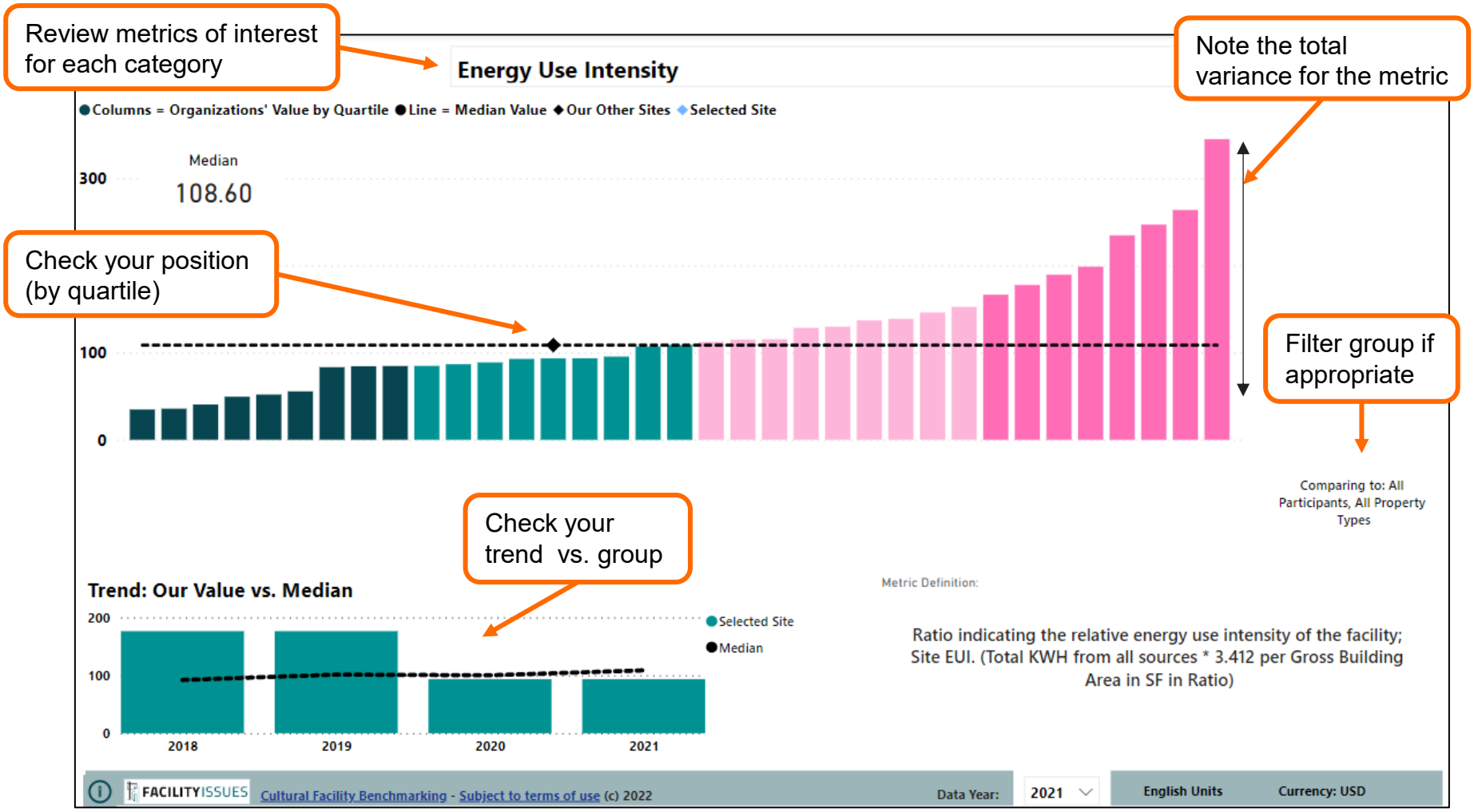
- Internal benchmarking report of your own data, also look a 5-year trends of key metrics to quickly check this year's data for consistency.

# Introduction/Settings Page Sets Units & Sitecode



# Quartile Charts Identify Your Performance by Metric

These charts are by metric category in the reports on Cost, Assets, Sustainability and Organization.



# Compare Performance vs. Objectives → Action?

| Want → / Are ↓ | Leader | Competitive | Not Priority |
|---|---|---|---|
| **Leader** | Document & Celebrate | Document & Celebrate | Evaluate Resource Allocation |
| **Competitive** | Incremental Improvements & Evaluate | Manage by Exception | Manage by Exception |
| **Struggling** | Evaluate Radical Changes | Incremental Improvements & Evaluate | Manage by Exception |

# General Types of Actions

## A. Document & Celebrate

- Validate data and performance, then document and share with leadership and stakeholders, publicly acknowledge contributors and have them share lessons learned.

## B. Manage by Exception

- Practice benign neglect and save attention for when the performance or trend deteriorate; delegate these areas to grow staff capabilities.

## C. Incremental Improvements & Evaluate

- Look for immediate incremental improvements (e.g. Lean approach; solicit ideas from staff and internal stakeholders; evaluate radical changes if insufficient progress.

## D. Evaluate Radical Changes

- Need to look at doing things significantly differently; look outside the organization and maybe hire a study.

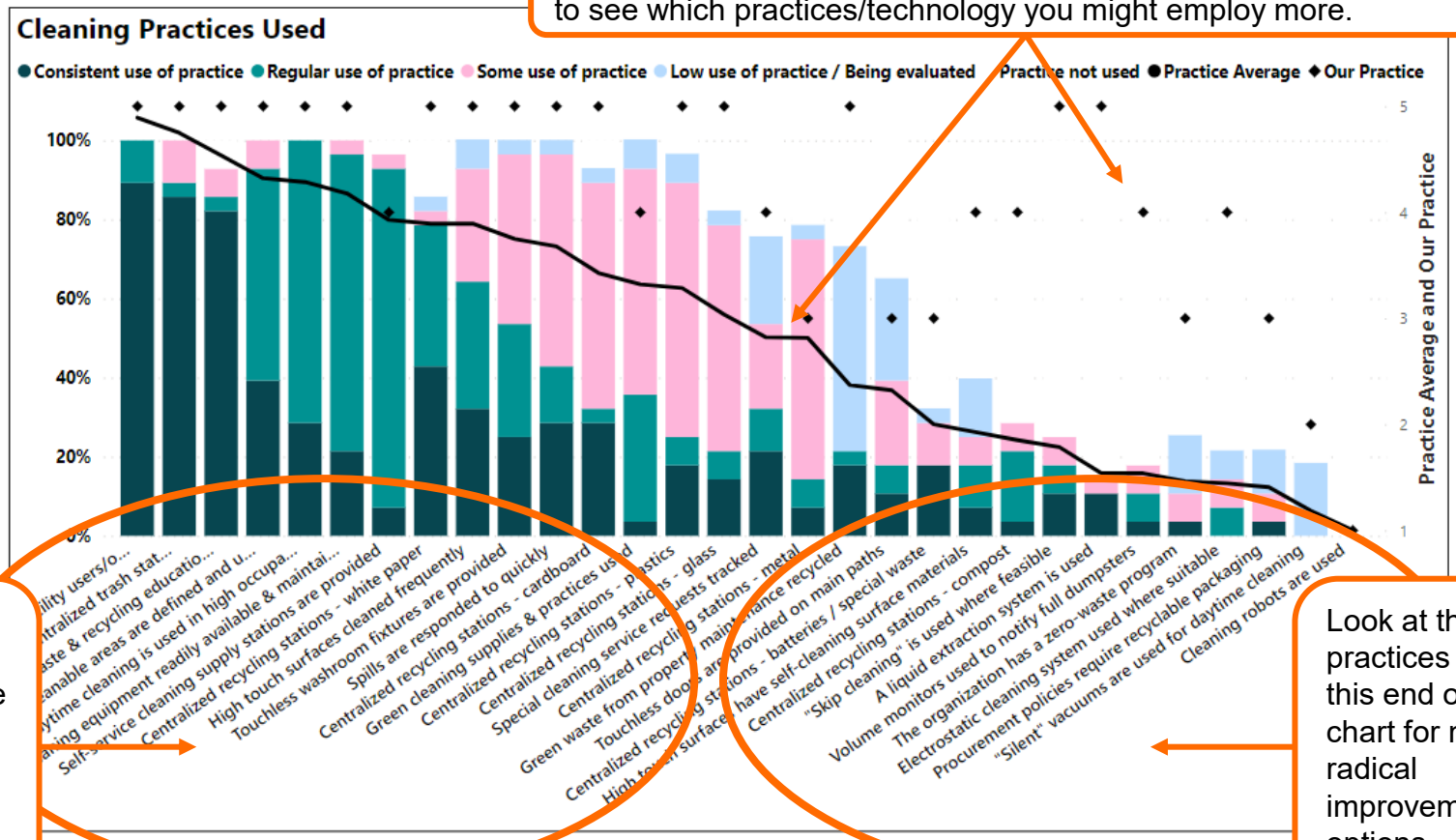
## E. Evaluate Resource Allocation

- Look at whether there are resources you can re-allocate to other areas.

# Review Use of Practices for Potential Actions

From monthly Shared Practice Meetings, In-Person Meetings, and Practice/Technology Charts by metric category in the reports.

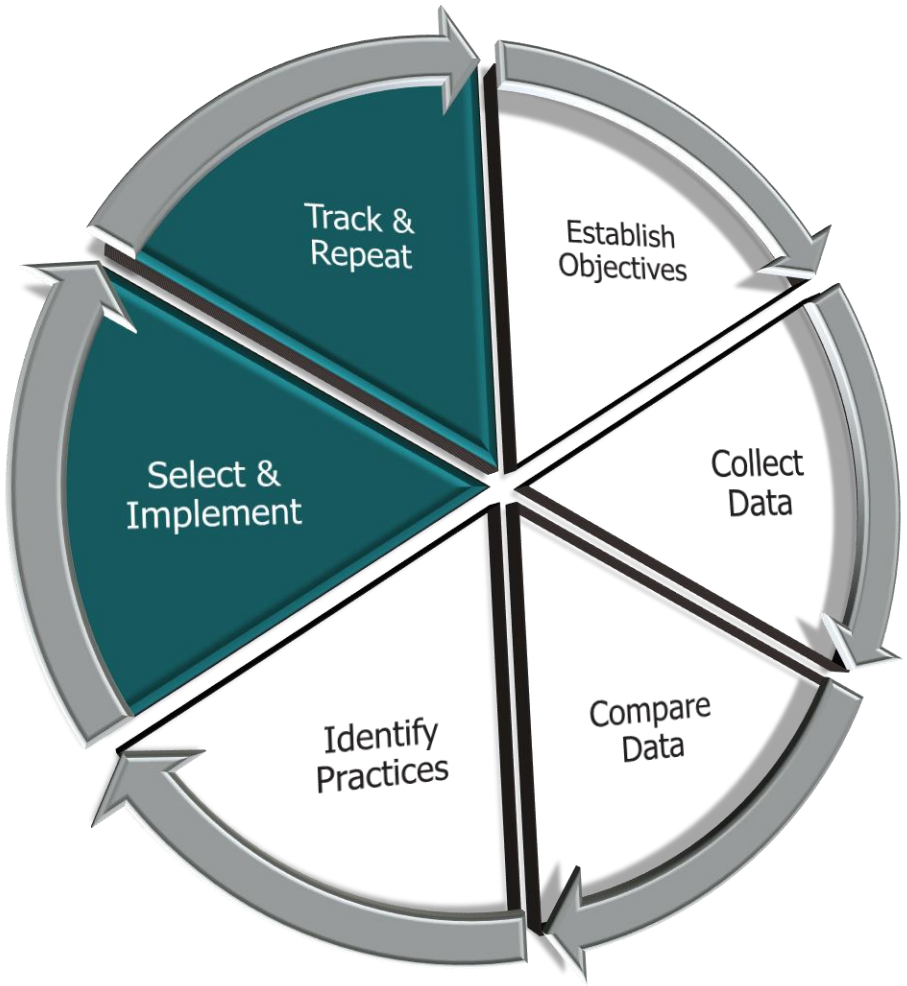
Compare your use (black diamonds) vs the average use (black line) to see which practices/technology you might employ more.




Look at the practices at this end of the chart for quicker, incremental improvement options.

Look at the practices at this end of the chart for more radical improvement options.

# Recap: The Facility Benchmarking Process (Steps 5 & 6)



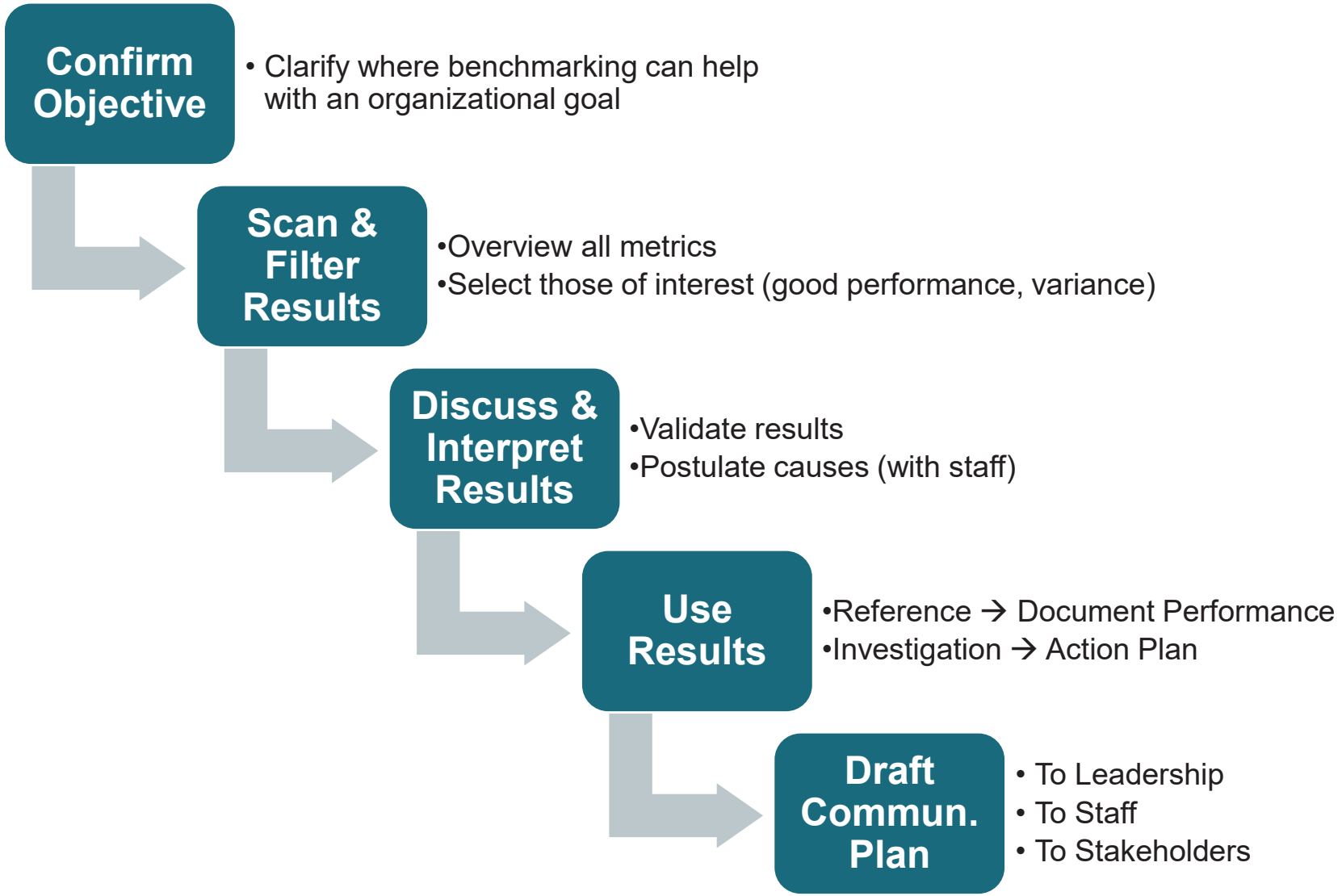

The last portion of the process is about what you choose to do with this information.

- Select feasible actions towards your objectives
- Track your progress on selected actions

The most common uses of benchmarking:

- **As a reference**:
  to answer questions that arise or defend reasonable performance.
- **To guide action**:
  to identify areas for continuous improvement or address specific areas of concern.

# Some Specific Activities To Review/Use Results



# 1. Confirm Benchmarking Objectives

General Objectives (***Reference***)

- General Awareness or Reference of Industry Metrics
- Status / Documentation of Your Organization's Performance

Specific Objectives (***Action***)

- Assessment of Your Organization's Competitiveness
- Improvement Planning
  - Specific Corporate / Department Goals
  - Tracking Progress on Last Year's Action Plan
  - Continuous Improvement / Identify Weak Areas

# 2. Scan & Filter Benchmarking Results

## Look at Overall Performance Across All Metrics

- Check for any potential blind spots or surprises
- Scan for Outliers
  - Is this metric important to us this year?
  - If so, is the variance significant enough to pursue?

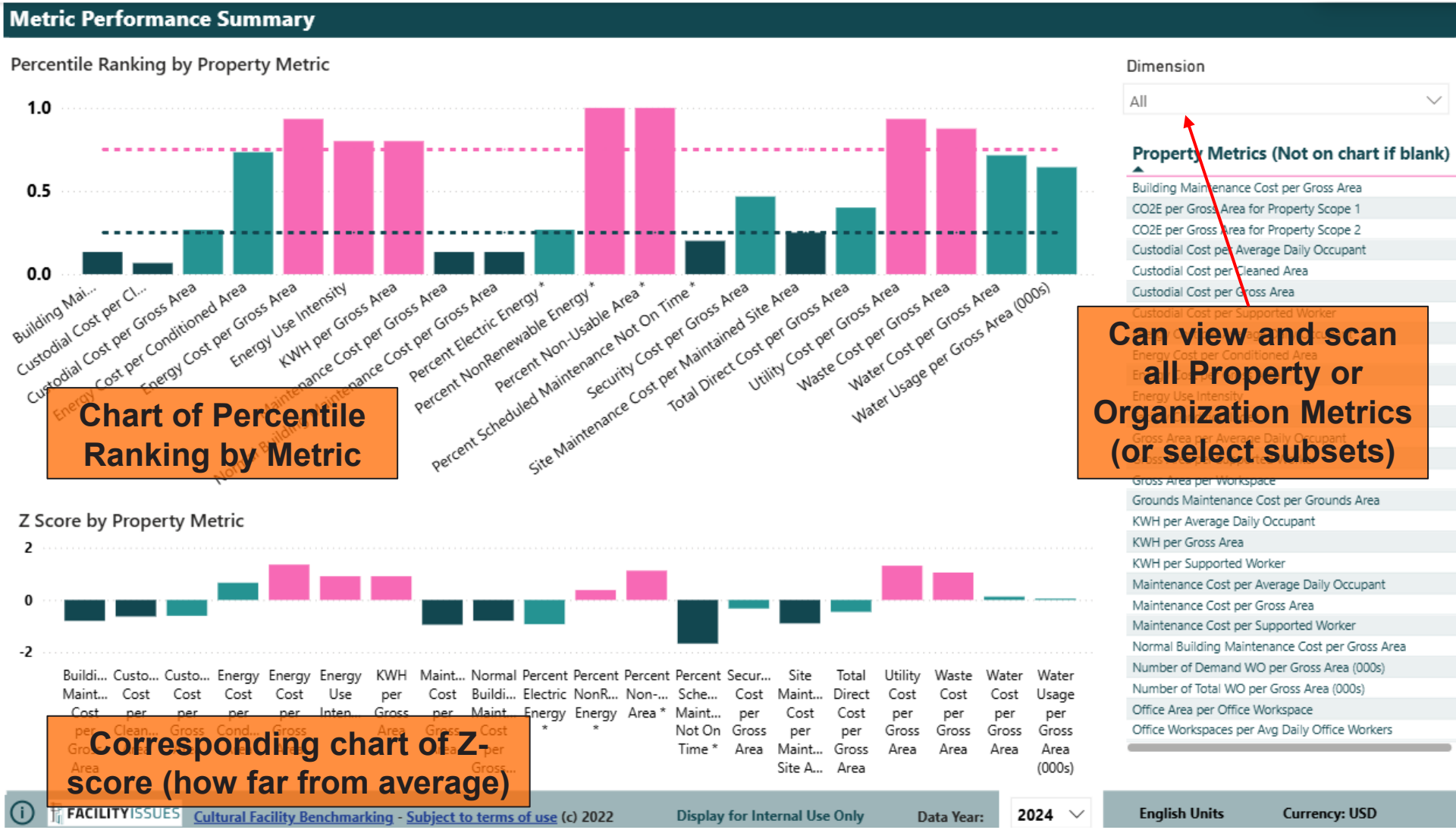
## Look Closer at Those Related to Your Objectives

- Which are Most Relevant
  - Is this metric one we should discuss with our team / leadership?
- How are They Trending

## Select Results for Review (A manageable number!)

- Areas of Good Performance
- Areas of Variance (Ones where you care that are significant)
- Actions with potential ROI
- Actions that are feasible to accomplish

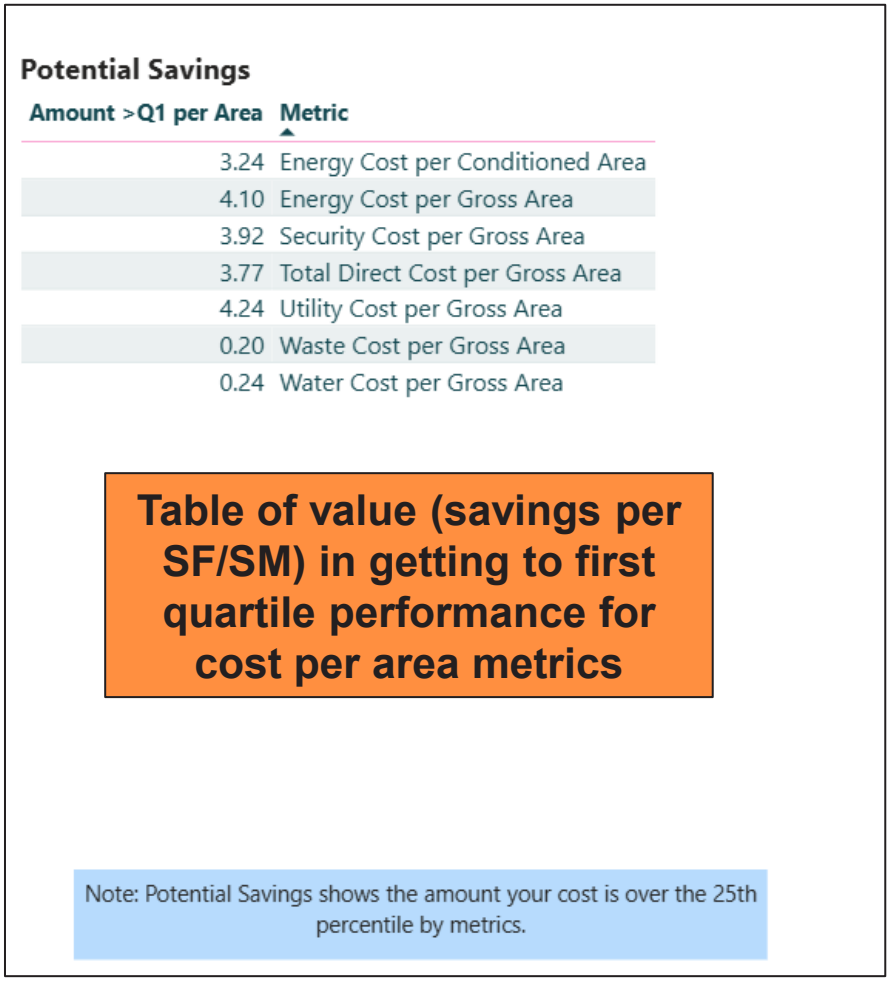
# Use New Performance Overview Charts




In the benchmarking Results Explorer report for now

# Use New Cost Savings Estimate Table

Helps you quickly estimate the potential value of pursuing cost savings.



**Potential Savings**

| Amount >Q1 per Area | Metric |
|---|---|
| 3.24 | Energy Cost per Conditioned Area |
| 4.10 | Energy Cost per Gross Area |
| 3.92 | Security Cost per Gross Area |
| 3.77 | Total Direct Cost per Gross Area |
| 4.24 | Utility Cost per Gross Area |
| 0.20 | Waste Cost per Gross Area |
| 0.24 | Water Cost per Gross Area |

**Table of value (savings per SF/SM) in getting to first quartile performance for cost per area metrics**

Note: Potential Savings shows the amount your cost is over the 25th percentile by metrics.

In the benchmarking Results Explorer report for now

# 3. Discuss & Interpret Selected Results

Ideally with Key Staff

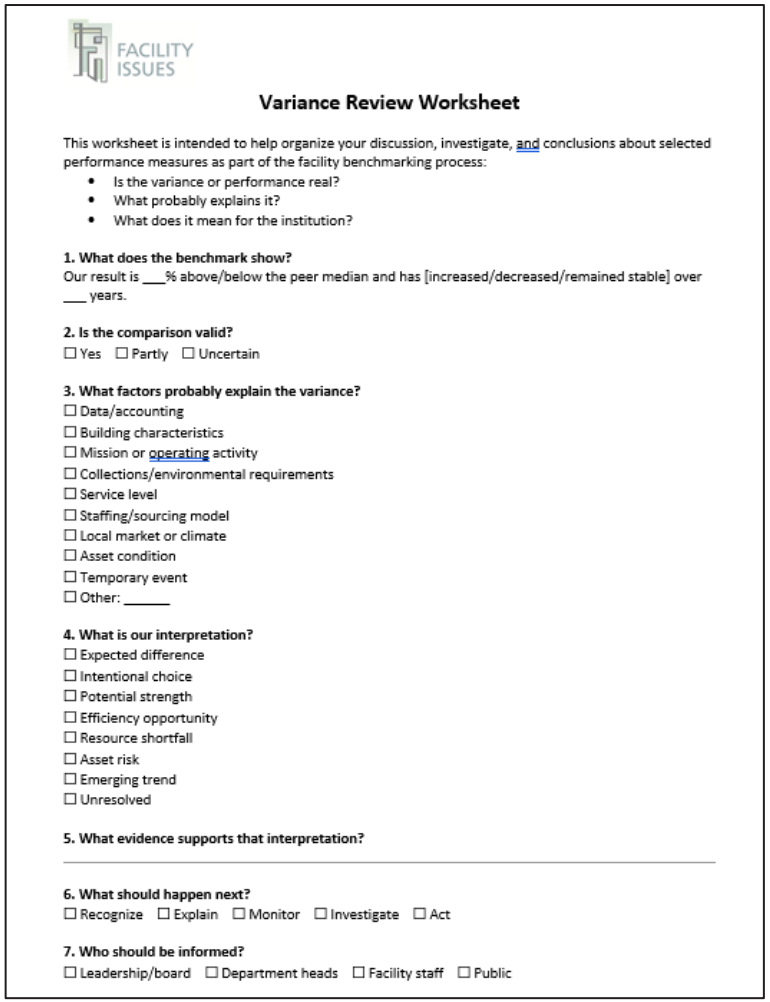
- Purpose of this discussion is NOT to defend, but to explore

A variance is a signal, not a conclusion.

- Every variance from the peer group is not a problem.

1. Verify it
   - Is it real or a data issue?
2. Explain it
   - What probably explains it?
3. Decide what it means (for your organization)
   - An acceptable difference
   - An accomplishment
   - An opportunity, or
   - A risk.
4. Decide what to do about it

# Use New Variance Review Worksheet Reference



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**Variance Review Worksheet**

This worksheet is intended to help organize your discussion, investigate, and conclusions about selected performance measures as part of the facility benchmarking process:

- Is the variance or performance real?
- What probably explains it?
- What does it mean for the institution?

**1. What does the benchmark show?**
Our result is ___% above/below the peer median and has [increased/decreased/remained stable] over ___ years.

**2. Is the comparison valid?**
☐ Yes ☐ Partly ☐ Uncertain

**3. What factors probably explain the variance?**
☐ Data/accounting
☐ Building characteristics
☐ Mission or operating activity
☐ Collections/environmental requirements
☐ Service level
☐ Staffing/sourcing model
☐ Local market or climate
☐ Asset condition
☐ Temporary event
☐ Other: _____

**4. What is our interpretation?**
☐ Expected difference
☐ Intentional choice
☐ Potential strength
☐ Efficiency opportunity
☐ Resource shortfall
☐ Asset risk
☐ Emerging trend
☐ Unresolved

**5. What evidence supports that interpretation?**

**6. What should happen next?**
☐ Recognize ☐ Explain ☐ Monitor ☐ Investigate ☐ Act

**7. Who should be informed?**
☐ Leadership/board ☐ Department heads ☐ Facility staff ☐ Public

## Review Areas of Good Performance

- Those to include in Executive Briefing
- Validate data

## Explore Likely Drivers / Reasons for Variances

- Are the variances worth attention / effort?
- Can quick tests / analysis confirm reasons?
- Are the reasons within Organization control?
- Are the reasons within Department control?

## Assess Areas That Warrant Consideration

- Areas that may need attention (Potential Risk)
- Areas with potential to pursue (Opportunity)
  - High Priority or High ROI and Feasible

## Consider Actions You Should Take

- Ignore
- Watch (monitor)
- Prepare (investigate or track for next year)
- Act (propose project or change in operations)

Variance Review Worksheet: https://facilityissues.com/wp-content/uploads/2026/08/Variance-Review-Worksheet.pdf

# *Examples of Variance Responses*

Explain variance and reason for suggested action

- **IGNORE/MONITOR:** *Our cleaning costs are high, but we had 3 vacancies and 2 extra exhibit changes last year. We expect this to resolve so we will just monitor it for the coming year.*
- **INVESTIGATE:** *Our maintenance costs are a little high and we are not sure why. We plan to do a review of the scheduled and unscheduled work that was done and report back in 60 days.*
- **ACTION:** *Our energy costs are high and our main boiler is near the end of its service life. We want to accelerate its scheduled replacement to this summer and expect payback in energy savings and reduced repairs to be about 8 years with reduced outage risk.*

Suggested Format:

- Our *metric from benchmarking indicates*, and *other data suggests why*, so *our recommendation is* because *reason*.

# 4. Use Results for Reference / Document Performance

## Prepare a Summary of Your Observations

- Draft Summary Review
  - Areas where results confirmed your direction
  - Areas where results surprised you
  - Ideas from discussions with peers or shared practice meetings
- List of Things to Watch or Monitor
  - Trends of concern
  - Marginal performance areas
  - Variances of concern beyond your control
  - Tracking on prior year's actions
  - Areas to think more about next year

# 4. Use Results to Draft Investigation / Action Plan

Prepare a Summary of Your Observations (above)

Determine The Suitable Response / Actions to Take

- Investigate
  - Areas warranting consideration without clear cause / reason
- Work on a Response Plan
  - Areas where action desired but solution needs to be designed
  - Ideas to discuss with peers
  - List of practices & technology to explore
- Propose Specific Initiative / Project
  - Clearly defined process / practice with likely impact (e.g. *switch from scheduled to predictive filter changes)*
  - Clearly defined project with likely impact (e.g. *replace old HVAC equipment)*
  - Identify the decisions and resources needed

# Use New Correlation Table

What practices are worth considering for performance improvement?

Cost vs. practice adoption?

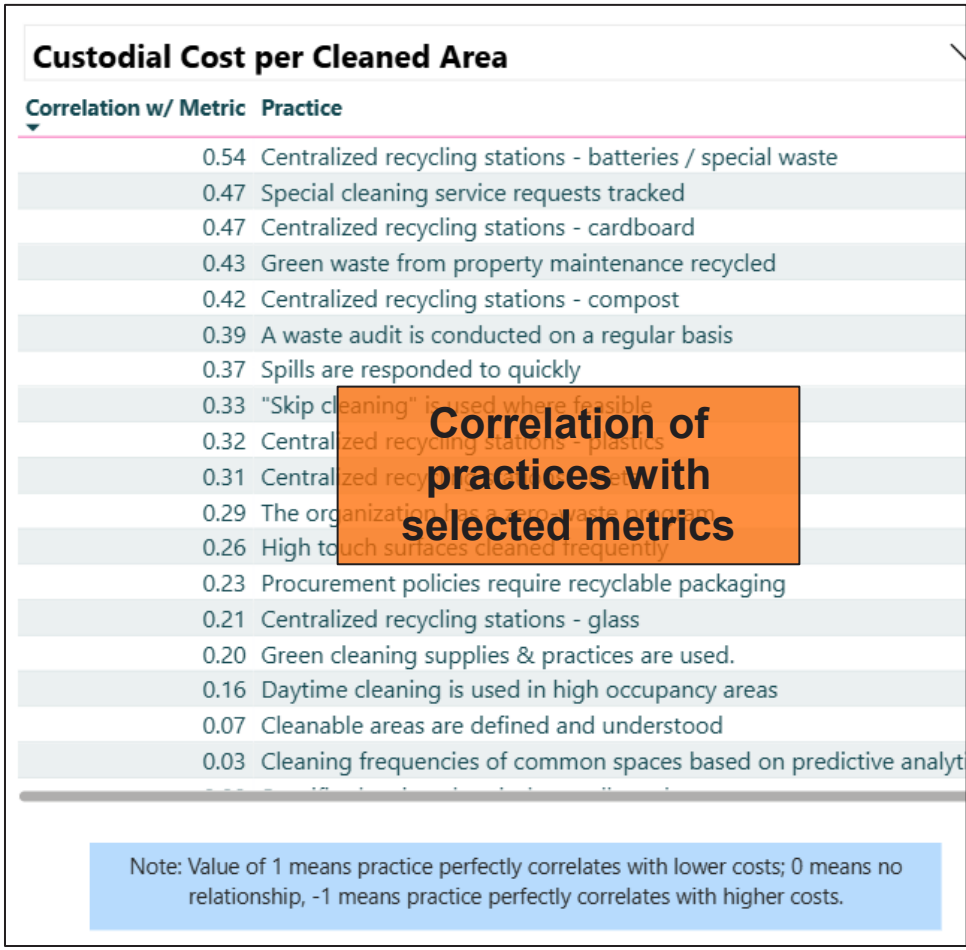
- Custodial Practices vs. Custodial Cost per Cleaned Area
- Maintenance Practices vs. Normal Building Maintenance Cost per Gross Area
- Utility Practices vs. Energy Cost per Gross Area

Energy use vs. practice adoption?

- Utility Practices vs. Energy Use per Gross Area

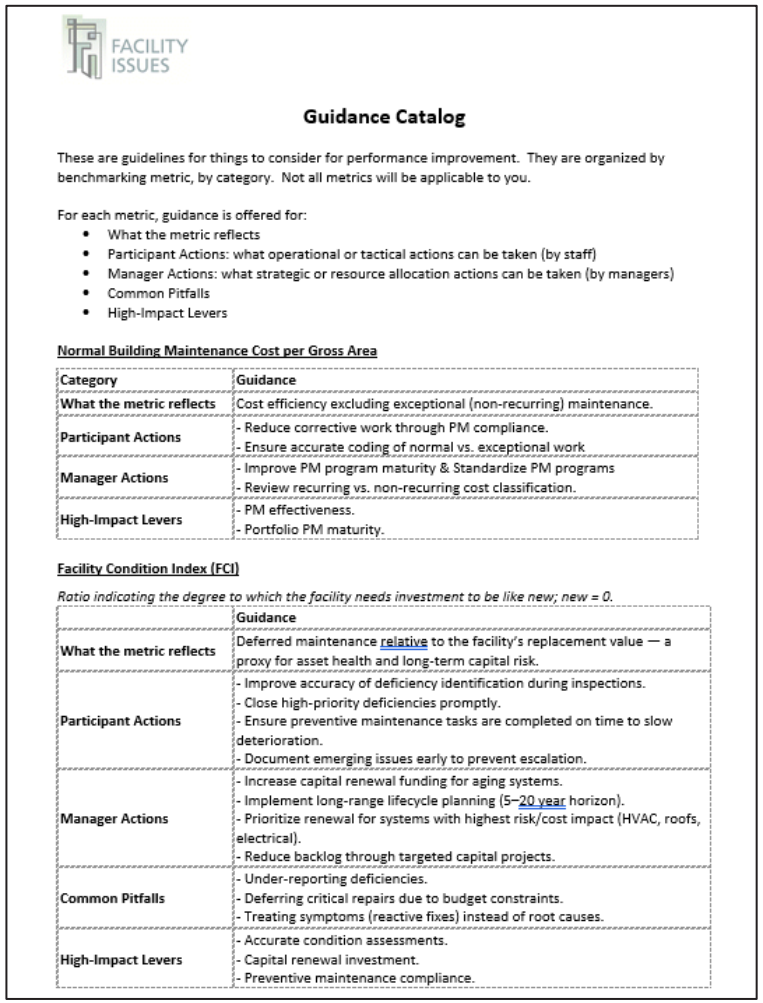
*Important!* While useful,

Correlation ≠ Causation




In the benchmarking Results Explorer report for now

# Use New Guidance Catalog Reference



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**Guidance Catalog**

These are guidelines for things to consider for performance improvement. They are organized by benchmarking metric, by category. Not all metrics will be applicable to you.

For each metric, guidance is offered for:

- What the metric reflects
- Participant Actions: what operational or tactical actions can be taken (by staff)
- Manager Actions: what strategic or resource allocation actions can be taken (by managers)
- Common Pitfalls
- High-Impact Levers

**Normal Building Maintenance Cost per Gross Area**

| Category | Guidance |
|---|---|
| What the metric reflects | Cost efficiency excluding exceptional (non-recurring) maintenance. |
| Participant Actions | - Reduce corrective work through PM compliance.<br>- Ensure accurate coding of normal vs. exceptional work |
| Manager Actions | - Improve PM program maturity & Standardize PM programs<br>- Review recurring vs. non-recurring cost classification. |
| High-Impact Levers | - PM effectiveness.<br>- Portfolio PM maturity. |

**Facility Condition Index (FCI)**

*Ratio indicating the degree to which the facility needs investment to be like new; new = 0.*

| | Guidance |
|---|---|
| What the metric reflects | Deferred maintenance relative to the facility's replacement value — a proxy for asset health and long-term capital risk. |
| Participant Actions | - Improve accuracy of deficiency identification during inspections.<br>- Close high-priority deficiencies promptly.<br>- Ensure preventive maintenance tasks are completed on time to slow deterioration.<br>- Document emerging issues early to prevent escalation. |
| Manager Actions | - Increase capital renewal funding for aging systems.<br>- Implement long-range lifecycle planning (5–20 year horizon).<br>- Prioritize renewal for systems with highest risk/cost impact (HVAC, roofs, electrical).<br>- Reduce backlog through targeted capital projects. |
| Common Pitfalls | - Under-reporting deficiencies.<br>- Deferring critical repairs due to budget constraints.<br>- Treating symptoms (reactive fixes) instead of root causes. |
| High-Impact Levers | - Accurate condition assessments.<br>- Capital renewal investment.<br>- Preventive maintenance compliance. |

Each metric has different factors that drive it, and a range of actions you can take.

- This catalog lists some common ones.
- Available for your team's reference on selected metrics where you want to consider action

For each metric included, guidance is offered for:

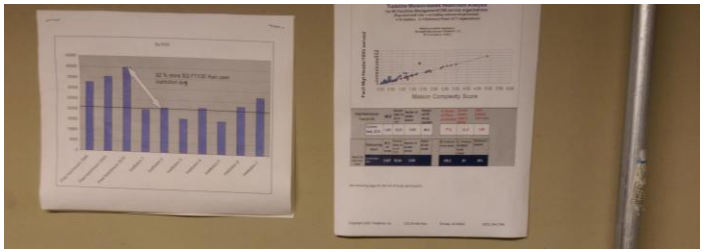
- What the metric reflects
- Participant Actions: what operational or tactical actions can be taken (by staff)
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# 5. Communicate & Implement



## Celebrate good results

- Post & publish annotated materials

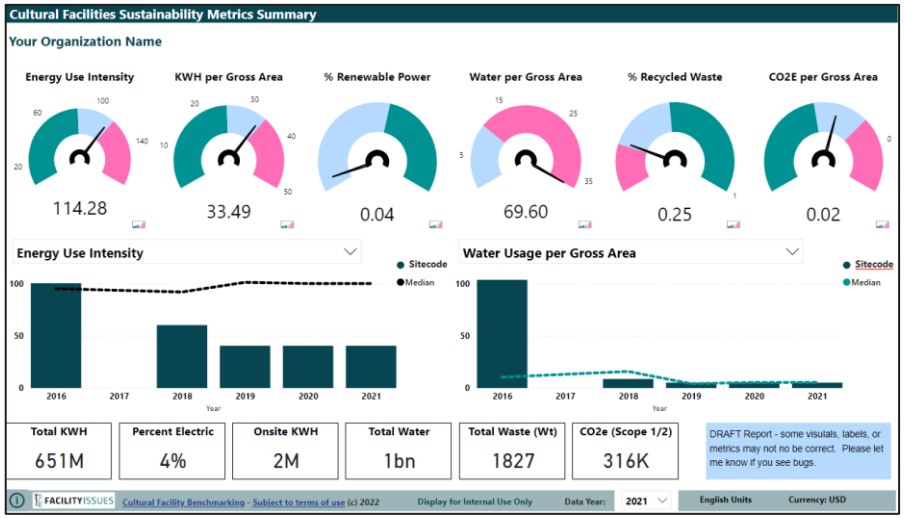


## Explain why action needed

- Performance is not good enough
- Desire to be leader

## Roll out “action plan”

- Obtain support
- Assign / solicit “champion”
- Maintain awareness & change management



# Questions, Suggestions, & Technical Support

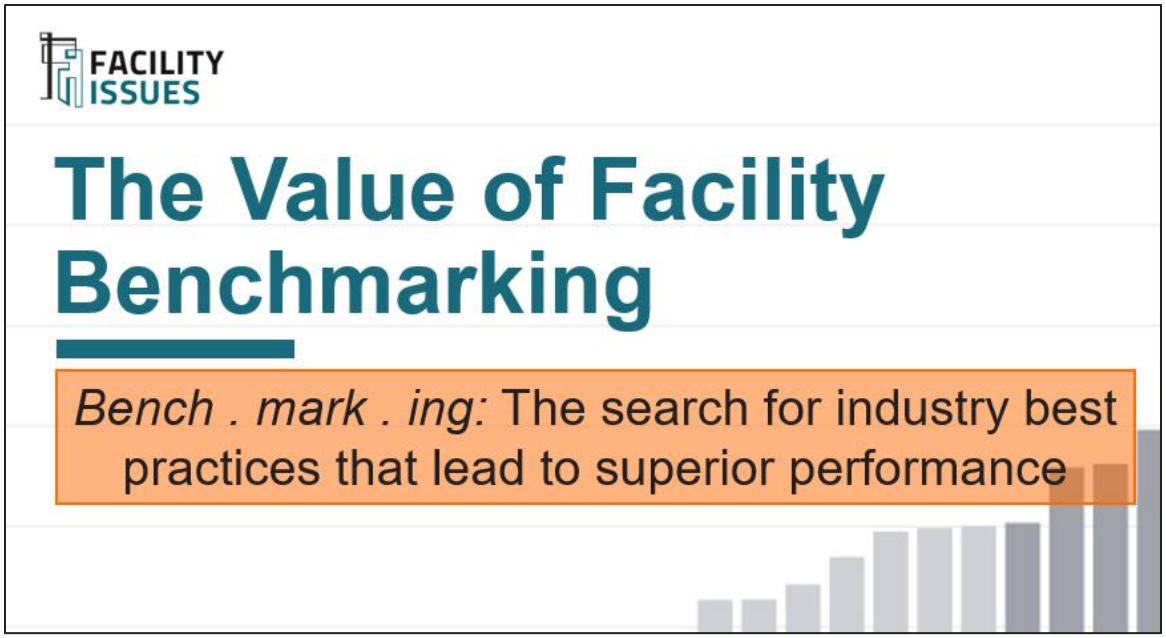
Phone and email support is available business hours (Eastern Time).

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

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# More Tips!




**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