



Review of Institution A's Facilities Dashboard

Facilities Forum

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Key Takeaways on Facilities Dashboards

Facilities dashboards offer an opportunity for senior Facilities officers (SFOs) to track their department's performance and identify metrics whose performance signals broader progress on Facilities objectives. Given how fraught the metric selection exercise can be, however, building an impactful dashboard can be a challenging exercise. The table below outlines the major challenges and principles to guide dashboard creation.

Dashboard Challenges and Principles








	Challenge	Principle
Metric Selection	Metrics are difficult to update	Only track metrics that are readily accessible, regularly tracked, supported by reliable data, or are easily communicated to others
	Reasoning behind metric selection is unclear	Identify metrics that map to strategic objectives or shed light on current high-priority imperatives
	Lagging metrics report on Facilities' performance after it's too late	Swap lagging for leading indicators to alert leaders to important trends
	Certain areas are overrepresented with many metrics	Balance metric categories by sorting metrics by function or strategic perspective
	Dashboard is majority "volume indicators" that only provide information on volume or scale	Aim to have approximately 80% of dashboard KPIs as "relative indicators" that relate two or more metrics and provide comparative information
Dashboard Design	Insufficient context for reported metrics	Include trends over time, clear labels, and brief metric definitions when necessary
	Too much information overwhelms the reader	Limit static dashboards to three pages or less ; interactive dashboards should include drop-down menus to display different types of information
	Overly complex visualizations distract rather than aid understanding	Use consistent arrows, icons, and/or colors to indicate directionality and progress
Performance Targets and Action Triggers	Dashboard reports trends but not performance goals	Set short or long term performance targets based on institutional mandates, industry benchmarks, or staff recommendations
	Facilities departments don't know when corrective action is needed during a negative trend	Create action triggers to guard against performance declines or performance plateaus

To better support **Institution A**, the Facilities Forum research team offers an assessment of the university's dashboard. This includes both advantages and recommendations. Beyond this analysis, we recommend that Institution A review the dashboard principles and metric suggestions provided in EAB's [Guide to Building an Impactful Facilities Dashboard](#).








Key Takeaways on Report Design

Facilities reports offer an opportunity for senior Facilities officers (SFOs) to showcase their unit's accomplishments and advocate for funding or other needs. However, it's not always easy to produce a clear and impactful report that campus leadership can easily understand. Below, we list a few design challenges and principles.

Design Mistake

-  **Too many metrics and KPIs**, not all relevant to report audience
-  **Long introduction** that buries important takeaways and delays reader from accessing main components of report
-  **Inconsistent organization** that confuses the reader and forces them to slow down and analyze data on their own
-  **Text-heavy pages using Facilities jargon**, difficult for non-technical readers to follow
-  **Graphs without sufficient explanation** (e.g., axis labels, titles, target performance)
-  **Emphasis on sharing Facilities data and concerns**, distracting reader with context rather than analysis
-  **Many different fonts, colors, graphics, and table styles** that are distracting to the reader

Design Principle

-  **Tailor the report to the intended audience** by filtering down metrics and including details relevant to their goals; connect metrics to institutional priorities
-  Begin the report with a **brief executive summary** to call out only the most important takeaways upfront
-  Structure each page to **highlight important points in a consistent pattern**, simplifying reader understanding about Facilities performance
-  **Use clear and concise language** to ease readability and speed comprehension
-  **Use graph labels** and highlight trends, directionality, and target performance indicator
-  **Include analysis on each page** to alert reader to trends and preempt questions about performance
-  **Choose a standard formatting** to make text and graphics consistent, accelerating reader comprehension

We expand on these design challenges and principles throughout our review of the Institution A's Facilities reports. Beyond this analysis, we recommend that Institution A review the communication principles provided in EAB's [Guide to Effectively Communicating Facilities Information Through Reports](#). This is one of seven tools in the [Facilities Communication Toolkit](#).

Institution A's Dashboard

Metric Selection

Strengths:

Institution A's metrics are wisely selected in that their relevance is accessible to a general audience, and they are well-supported by data. Taken overall, they provide a comprehensive overview of Institution A's Facilities portfolio that communicates its scope well, mostly via expense figures and square footage-related metrics.

Effort was also clearly made to balance metric categories, which is generally good practice.

Opportunities:

The first opportunity is to expand the dashboard to **include a balance of metrics across the Facilities unit**. Currently, Institution A's published KPIs are mostly limited to high-level indicators dealing with the division's budget, the size of the Facilities portfolio, and some metrics related to staffing and customer satisfaction. There is little to no information provided on safety and compliance, space management, and other key topics. If this data is collected but not included here, consider expanding the scope of the report. If this data is not collected, EAB's [Guide to Building an Impactful Facilities Dashboard](#) offers suggestions for dozens of metrics across ten functional categories that can be used to build a more robust KPI dashboard.

The second opportunity is to **include more relative indicators**. Currently, Institution A's reported KPIs include mostly volume indicators such as gross area of owned buildings or total capital spending per year in different categories. While these metrics may occasionally help the reader develop a sense of scale, volume metrics rarely create an "a-ha" moment for readers because they do not give any sense of trajectory (upward or downward) or progress on various metrics. By comparison, relative indicators enable leaders to quickly parse more valuable insights by comparing at least two categories. See the table below for a handful of volume indicators that Institution A's dashboards currently track, along with potential relative indicators to use in their place.

Current Metric	Potential Substitute or Additional Metric(s)
Gross area of owned buildings	<ul style="list-style-type: none">• Percentage of owned buildings occupied• Percentage of leased buildings occupied• Percentage of gross area that is owned space
Missing financial metrics	<ul style="list-style-type: none">• Net operating income per m² of real estate• Total cost of leased space per m²• Rental income percentage change

Finally, in addition to diversifying the categories of metrics presented, it may also be worth rethinking how many metrics are in each category. As state above, the report was clearly created with an eye to balance, which a laudable goal. However, currently most categories (e.g., space management, transportation) only have one KPI present. It is advisable to rebalance this representation to better reflect both Facilities' portfolio and its impact. Report authors can consult the Facilities org chart or the university strategic plan for inspiration on this front.

Source: EAB interviews and analysis.

Institution A's Dashboard

Dashboard Design

Strengths:

Virtually all of the KPIs on Institution A's dashboards are portrayed in graphs, which helps the audience visualize trends. Institution A also uses a variety of graphs depending on what might be most useful for displaying the data—the customer service graphs are a great example of choosing a format that helps the reader quickly see the most important points.

The report is also quite attractively and clearly designed overall, with consistent visuals and data callouts that do not overwhelm the reader. Notably, it avoids the common pitfalls of making charts and graphs too complex or including too much content on each page.

Opportunities:

There are several charts or graphics that are not quite clear in their communication. On p. 24, "Work Tasks," EAB would recommend getting rid of the line tracking the goal completion time, as it looks as if it is measuring a trend over time. Instead, place a second bar beside each type of work task to show the difference between the two, as was done on p. 14 with the customer service data. It's also not clear what the "average building inspection score" on p.25 refers to, or if this is a good or bad number for Institution A.

Finally, there are several blank pages in the report (p. 27, "Alterations" and p. 28, "Sustainability"). It is not clear if these were left in by accident or if this is a late-stage draft that is not yet finalized; regardless, they should be either completed or removed for future versions.

Performance Targets and Action Triggers

Strengths:

Institution A has done an adequate job of portraying data trends for the majority of its dashboard KPIs. However, it's not clear what Institution A's goal is for the reported metrics. While some sections of the report indicate improvement over time, such as the customer service satisfaction metrics and the staffing levels figures, overall, few of the numbers reported have any context. If the goal is to report current performance as a snapshot in time, leaders should consider adding a signal of directionality—do they want the metric to increase, decrease, or hold steady?

Opportunities:

The main opportunity is to **add performance targets and action triggers throughout the dashboards**. Without these, it's difficult for a reader to discern the health of the unit. Add a line or another signal to quickly indicate where Institution A aspires a metric to be over time.

Overall, much of the current data alludes to current trends, with the implicit assumption that data should continue trending up or down, depending on the metric. However, this strategy can be a missed opportunity for Facilities leaders. Continuous improvement performance targets should have short-term goals as well as long-term ones in order to encourage progress. Adding in these markers will enable Facilities leaders to even better discern the health of the Facilities unit and anticipate any problems.

Institution A's Dashboard

Institutional Dashboard Examples

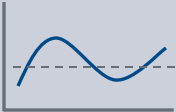

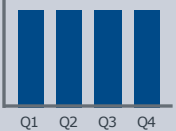
To view Facilities dashboards at other higher ed institutions, visit the links below.

- [Arizona State University Energy Dashboard](#)
- [California State University—East Bay Facilities Management Dashboard](#)
- [Columbia University Sustainability Dashboard](#)
- [Northwestern University Facilities Management Dashboard](#)
- [Northwestern University Vertical Transportation Equipment \(VTE\) Dashboard](#)
- [The New School Sustainability Dashboard](#)
- [University of Minnesota Classroom Utilization Dashboard](#)
- [Western Michigan University Facilities Management Dashboard](#)

Options to Source and Create Performance Targets

Performance Target Option	Benefits	Limitations
Institutional Mandate Defer to institutional requirements when applicable (e.g., carbon footprint reduction, workforce diversity, safety and compliance)	Mandates take highest precedent for setting targets, requiring less effort from Facilities	Very rare; most applicable for sustainability goals or safety and compliance metrics ¹
Industry Benchmarks Leverage industry association standards (e.g., APPA, FEA ²), peer performance, and regional standards (e.g., construction costs for local businesses)	Industry standards, peer data, and out-of-industry benchmarks offer a principled approach to set metric targets	Benchmarks not available for all metrics; institution-specific circumstances and lack of standardized definitions makes comparison difficult
Crowdsource with Staff Rely on frontline staff expertise to establish aspirational yet realistic metric goals	Taps frontline staff expertise, which can create buy-in for dashboard efforts	May yield overly aggressive or less ambitious targets
Continuous Improvement Establish ambition to continually improve metric within defined time frame (e.g., monthly, quarterly)	Most straightforward approach for establishing targets	Goals can be vague; may create low standards for improvement

Three Types of Action Triggers

Trigger Type	Definition	Benefits	Limitations
Fixed Triggers 	Minimum performance thresholds designed to guard against significant performance declines that, without corrective action, would likely cause units to miss nonnegotiable targets	Easy to calculate and communicate	Not applicable for many Facilities metrics
Relative Triggers 	Self-adjusting thresholds that consider current performance relative to the target, past performance, and/or related metrics to identify concerning trends	Applicable for a wide range of metrics; self-adjustment ensures longevity	More complex and difficult to manage than other triggers
Specialty Triggers 	Static action triggers mandate continuous improvement to guard against performance plateaus	Easy to calculate and manage against	May be perceived as unprincipled and therefore ignored by stakeholders
	100% triggers signal metrics that demand perfect performance	Avoids significant negative consequences	Only applicable for specific metrics (e.g., safety, compliance)



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