Succession Planning: Preparing for the Future of Your Facility and Your Career

Ed Avis
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Executive Summary

The field of health care facility management faces several challenges. The health care physical environment is becoming more technically challenging and more regulated. The number of individuals qualified to manage and maintain the health care built environment is diminishing because of retiring baby boomers, burn out, and career mobility. Educational career paths to train future health care facility managers and technicians are rare. Facility staffs are now leaner than in years past, so retirements and vacancies can result in critical gaps. Amid all of these forces, succession planning provides health care organizations with strategies to ensure that facility leadership and technician positions are filled with qualified, competent, motivated individuals. This monograph provides the information necessary for health care facility managers to conduct succession planning and provides individuals in all positions a path for personal career development. The monograph will show you how to:

- Identify key positions that require succession planning strategies
- Define the competencies required for the identified positions through accurate position summaries
- Assess current employee competencies for key positions
- Identify and develop internal resources to fill gaps in education and experience
- Cultivate external resources and relationships to fill key facility positions
- Plan for personal career growth
Introduction

The average age of health care facility managers is in the mid-50s, and many in the field will be retiring within the next decade. The looming retirement of baby boomers means that health care organizations have an essential task awaiting them: succession planning.

Succession planning in the facility management department is critical for filling key positions and for moving team members up the career ladder. Succession planning is uniquely important for facility departments for several reasons.

**SPECIALIZED KNOWLEDGE:** Facility management in health care is more complicated than facility management in other fields. The number of regulations health care facilities must follow is far greater than nearly every other type of facility, and the literal “life or death” nature of health care is not found in many other fields. These characteristics mean that a facility manager in a health care facility needs a great deal of specialized knowledge. The job is changing, and newer focus areas such as the patient experience and real estate management are leading to a need to continue developing skills.

**INSTITUTIONAL MEMORY:** Each health care facility is unique. Facility managers who have been with a particular organization for years develop a deep understanding of the peculiar quirks of their facility—such information cannot be found in any code book or instruction manual. Each organization also has its own culture, which is important to understand since leaders responsible for the physical environment interact with almost every function and user group within the organization. When long-time facility professionals retire, institutional memory about the facility can be lost, making management of the facility more difficult for those who remain.

**POORLY DEFINED CAREER PATH:** Most young adults choosing a career don’t know that the profession of health care facility management even exists. That means that most people who join the profession do so almost accidentally; perhaps they worked on the construction of a health care facility and were invited to stay on in the facility department once the facility opened, or maybe
they worked at the facility on temporary assignment with an HVAC firm and then developed an interest for working in health care. Countless stories tell of facility leaders who began as technicians or laborers and moved up without the benefit of a formal career ladder.

**INSUFFICIENT EDUCATIONAL ENTRYWAYS:** Contributing to this career path confusion is the fact that few educational opportunities exist that lead directly into health care facility management. A handful of related college and university programs are discussed later in this monograph, but there are not many programs specifically focused on health care facility management. Since these programs are rare, students who otherwise might be interested in facility management often move to other areas with more readily available education and opportunities.

**LONG TENURES:** Many facility leaders report a “log jam” in the upper ranks of health care facility management, which can discourage high-potential candidates from pursuing leadership opportunities. This log jam may be the result of two factors. First, health care organizations are good places to work, so once an individual becomes a facility leader, he or she tends to stay in the position for a long time. Second, consolidation and mergers in recent years have eliminated some managerial and leadership positions, further tightening the career opportunities.

For all of these reasons, health care facility departments are facing a critical shortage of future leaders. Succession planning is essential to address this shortage.

**What Is Succession Planning?**

Succession planning is the proactive process of identifying key positions and implementing a program that develops employees to fill those positions when vacant in an effort to minimize operational disruptions and ensure successful transitions. Succession planning is a multi-step process that identifies and prepares an organization’s future leaders. This monograph will explain each step, but in brief the steps to succession planning include:

- Identifying the positions that need to be covered by your succession plan
- Determining the competencies (skills and experiences) required for that position
- Identifying the likely candidate in your organization to eventually fill that position
- Preparing that individual with training, education, mentoring, and so forth
Keep in mind that succession planning should not be limited to the top positions in a facility department. Any important position—from a key supervisor to vice president of facilities—may be part of a succession plan. While this document focuses primarily on management and leadership positions, the same process is applicable to technical and skilled positions.

Succession planning is more than a document to dust off when someone retires. Proper succession planning continually identifies the right people for future jobs and can help employees reach their career goals.

**Using this Monograph**

For the purposes of this monograph, we have separated succession planning into two broad buckets—organizational succession planning and personal career planning. First, we will look at organizational succession planning. If you are a facility manager wanting to plan for the future of your department, this section will be of particular use. Next, we will look at personal career development. This section can be used by anyone to help plan their career path. The final sections of this monograph are resources that can apply to both organizational succession planning and personal career development.
Organizational Succession Planning

Human resources departments are valuable during succession planning, but ultimately the responsibility for a smooth, successful succession in a facility department falls to facility leaders. After all, you know the needs of your department better than anyone else and you know the qualifications required for those positions.

That being said, collaboration with the human resources department and the C-suite is essential. Human resources professionals can help with the process and help communicate the plan to other stakeholders. Facility leaders should work with human resources staff to identify the positions that need to be planned for; determine the characteristics of the ideal candidates for the positions; and identify likely candidates within the department.

Involving the C-suite is essential because their buy-in is necessary. The C-suite can make sure the needed resources are allocated for the plan, and their involvement communicates to the entire organization that succession planning is essential. This may be particularly important to the potential future leaders identified in the plan; they want to know that the C-suite supports the plan.

Steps in Succession Planning

Succession planning is a multi-step process that starts with an understanding of the organization’s long-term strategy and concludes with regular reviews of the succession plan.

**REVIEW YOUR ORGANIZATION’S STRATEGY:** The need to plan for the replacement of the facility department head may seem obvious, but the characteristics of tomorrow’s successful facility leader may not be the same as the ones required today. Furthermore, the positions you need to include in succession planning may change over time.
A best practice in succession planning is to examine the organization’s long-term strategic plan to see whether it contains anything that may affect the facility department’s leadership requirements.

For example, if the organization currently operates one health care facility, the top facility director needs a set of skills and experiences to manage that work. If the strategic plan calls for mergers and acquisitions, the facility leader may need additional skills (real estate management, for example) to be a vice president of facilities. A good succession plan will take the strategic plan into account.

Events that could trigger changes to your succession requirements include expansions, mergers and acquisitions, closing of facilities, changes in focus, addition of major clinical lines, and changes in staffing philosophy (“flattening” the organization, for example).

**IDENTIFY THE POSITIONS THAT REQUIRE SUCCESSION PLANNING:**
Creating a succession plan for the top facility leader is obvious, but don’t stop there. If a position requires continuity for any reason, it probably should be included in the succession plan.

For example, what would happen if your construction manager told you tomorrow that he’s leaving for a new job? Wouldn’t it be great to have someone already identified who could step into his shoes and take over the existing construction projects without a long training and orientation process?

Every organization is different, but a general rule of thumb is that people should have a successor identified if they have other people reporting to them or if the work they do requires specialized knowledge that others in the organization don’t have.

**IDENTIFY THE IMPORTANT CHARACTERISTICS OF EACH POSITION:**
Creating a succession plan has the side benefit of forcing you to consider the job description or position summary of every important position. Job descriptions typically focus on employment criteria such as qualifications, shift requirements, reporting structures, scope of authority, and so forth. Position summaries are sometimes more helpful because they can expand on the purpose of the job, skills needed, and essential responsibilities. See Appendix C for more information on creating position summaries. As you consider the job descriptions or position summaries of every important position, make sure the descriptions still fit the overall strategy of the organization. Someone may have been hired a decade ago under certain circumstances that no longer exist.
For example, did you hire a manager with experience in hazardous waste management and then a few years later outsource your hazardous waste handling? If so, perhaps you don’t need to include “experience with hazardous waste management” as a characteristic for that manager’s position.

As you examine the characteristics of each position, create a list of competencies—the skills and experiences needed for the job. Also include educational requirements, level of experience, ability to work certain schedules, and other key characteristics. Don’t hesitate to include characteristics that the current incumbent does not possess. Remember, you’re creating a plan for the future, not a plan for maintaining the status quo.

Check Appendix B for a matrix that can help you examine the competencies needed for various jobs.

**EVALUATE CURRENT STAFF:** Next, consider the other people in your organization who could fill each spot included in the succession plan. This evaluation is a major step in planning because the result of this step is the succession ladder.

Compare each individual’s skill sets, experience, education, leadership abilities, and other characteristics to the list of competencies you created for each position. Looking within each department to find likely successors is logical, but don’t confine yourself to that group. Don’t overlook great candidates for a construction manager just because they are working in HVAC now.

Ask your employees about their own goals and see what meshes with the goals of the organization. Some people don’t realize they have potential, but if prompted, can thrive in a more challenging role. Others are driven and are already working toward their next career move. Some people aren’t interested in moving up the career ladder. The goal is to set up employees for success based on their personal goals and the goals of the organization. See Appendix A for a sample succession planning worksheet that can help you evaluate staff.

When evaluating current staff members, one of several things may happen: You might find someone who seems perfect and is ready in every way; you might identify someone who is right in many ways but has gaps in their skill set that can be filled with training or education; or you might discover that no one in your organization is prepared to move up into the position in question. Each case requires a different approach.
• **The perfect candidate:** The perfect successor is a rare find. If you identify someone in the organization with all of the characteristics needed to fill the next spot up the ladder, take steps to make sure that individual plans to stay in your organization. One way to do that is to discuss with the employee the possibility for an important promotion. However, that strategy has some risks, including the possibility that other high achievers will decide they should leave the health care facility if they believe the heir apparent has already been determined. Generally, though, experts suggest being open with the succession ladder regardless of that potential result.

Being open about a succession plan does not mean that an organization is locked into it; things can always change. A succession plan allows an organization to begin preparing up-and-coming leaders for their next positions, and it helps keep those employees content. Another way to keep high achievers content is to move them to other positions in the health care facility, even if the moves are lateral. This creates a more well-rounded candidate for leadership and keeps the employee engaged while they wait for the next promotion.

• **The good candidate with gaps:** A good but not perfect potential successor is probably the most common situation—a candidate who has leadership potential and some of the characteristics required of the next position but is missing some competencies. This person should be trained up to the position, either internally or through a formal training program.

• **No good candidate:** If no one emerges in your search, you may need to hire someone who can eventually take over the top spot or identify an outside candidate who could fill the job when the time comes. The latter option is not ideal because hiring from within reduces the learning curve, but it may be necessary. The possibility of having to hire from outside demonstrates the value of networking; if you know good people at other organizations in your community, you will be more likely to identify a decent candidate.

**DOCUMENT THE DECISIONS:** The succession plan should be documented in a way that can be easily edited over the years. Some organizations create databases of employees and positions with each employee’s qualifications spelled out. The databases match the employees to likely higher-up positions, and they can be easily edited when employees gain more experience or education, or when positions change. Some off-the-shelf solutions are available.
for documenting succession planning, or you can develop your own way to record decisions. Some people document the succession plan in a three-ring binder that includes job descriptions, names and qualifications of candidates, and the career plans for those candidates.

However you do it, make sure your plan is not static. A succession plan needs to be regularly reviewed to make sure it is current. Each time an employee joins the company; leaves the company; or gains a credential, degree, or commendation; the database or documentation should be edited. Similarly, if the organization's strategy changes or the company acquires or merges with another, make sure the succession plan still works.

**DEVELOP INTERNAL RESOURCES:** Once you have identified the likely candidates and the gaps that exist in their skills and experiences, the next step is working to fill those gaps.

The first step in this process is to identify a curriculum that will train future leaders for new roles. This curriculum should address the requirements needed for the job. In addition, the curriculum should teach future leaders about the organization itself and perhaps include general leadership education. If your organization has leadership training, make sure the future facility leaders take part. Consider outside leadership training such as ASHE's Beyond Competency: Health Facility Leadership Skills Development Program, which covers leadership and communication skills for facility professionals.

A number of other methods and resources are available to train future leaders:

- **Cross training:** Have future facility leaders work in other departments of the organization so that they build connections and learn how other departments work. They will also see how the facility department interacts with the rest of the organization.

- **On-the-job training:** Encourage future leaders to work side by side with various individuals within the facility department hierarchy to learn how things are done. Add responsibilities as appropriate so they get the full experience.

- **Coaching and mentoring:** Coaching and mentoring up-and-coming leaders can help give them the insights they need to move to a new role. Coaching typically focuses on helping an employee improve their skill set. The coach may offer advice on behavioral changes or suggest learning opportunities that can help them move up the career ladder. Mentoring is typically focused on longer-term personal and
professional development and is not tied to specific performance goals. A mentor should offer perspective, support, and wisdom based on personal experiences.

- **Enrollment in college programs**: Consider online college programs in facility management if there is no local option. For example, Owensboro Community and Technical College in Kentucky has an online program in health facility management that working adults can take remotely.

- **ASHE resources**: ASHE offers several educational programs, including classes held in locations around the country and programs offered entirely online. Members can access resources to help their career development, including monographs, webinar recordings, sample policies and procedures, and tools.

- **Resources from other organizations**: Consider which organizations make the most sense for your role. For example, for resources about real estate management not specific to health care, consider BOMA (Building Owners and Managers Association) International.

**CULTIVATE EXTERNAL SOURCES**: Facility leaders can turn to a number of key external sources when looking for future potential leaders.

- **College/university programs**: While only a few college programs focus on health care facility management, many colleges have programs in facility management, construction management, and the like. Hiring individuals directly from college programs is one way to bring in new staff with at least a minimum understanding of the profession. In health care, degrees and certifications are highly valued, so having such a degree can be a good step toward a leadership position. However, because of the deep complexity of health care facility management and the pressure of working in a highly regulated environment, even the best college graduates will likely require extensive advanced orientation and training to become effective facility leaders.

- **Internship programs**: Hiring an intern is an ideal way to learn about a potential future employee and orient that individual to your organization. ASHE has an internship program that connects students with programs at member facilities. The program is open to students studying engineering, facility management, and other related fields. In addition to their work in health care facilities, interns also gain knowledge through ASHE’s Managing Life Safety e-learning
course and the Fundamentals of Health Care Facility Management Program.

Internships can spark students’ interests in the health care facility management field, often prompting them to apply for regular openings after graduation. Internships allow health care organizations to “try out” employees prior to considering them for permanent positions.

Hosting an intern can sometimes be a challenge when interns count toward a department’s FTE count. Situations like this could discourage a department from bringing on an intern, but potential solutions include:

- **ASHE CHAPTER INVOLVEMENT:** If the local chapter can technically “hire” the intern and assign them to the health care facility—rather than the health care facility directly employing the intern—the intern will not count as a health care facility FTE.

- **TEMPORARY AGENCY:** If the health care facility has the budget for an intern but does not want to add to its FTEs, it may ask a local temporary agency to hire the individual and assign them to the health care facility. This would cost more than directly employing the intern because of the agency’s fees, but the agency would handle all the paperwork and benefits and the intern would not count as a health care facility FTE.

- **ENGINEERING/CONSTRUCTION FIRM INVOLVEMENT:** If the health care facility has a relationship with a local engineering firm or construction company, that organization could hire the intern and assign them to the health care facility. The engineering or construction firm would bill the health care facility for the intern’s services, but the rate would be lower than that of an engineer or project manager. This arrangement would expand the intern’s experience since they would be exposed to both the health care facility and the engineering or construction firm.

- **The military:** The military is a great preparation ground for future health care facility managers. Since military careers are often short—sometimes only six years and rarely more than 25 or 30 years—veterans enter the workforce with solid experience and many working years ahead of them. Individuals who served in engineering or health care facility leadership capacities (typically officers) may go
directly into facility leadership. Those who served in technical areas, such as Navy “utilitiesmen,” may go into the trades within health care facility departments.

Here are some of the other benefits of hiring military members:

- **LEADERSHIP TRAINING:** Military leadership training emphasizes a strong chain of command and respect for all levels of workers. The distinctions among ranks, on both the enlisted and officer sides, are clear in the military and imprint the importance of following orders. On the other hand, the military is also careful to respect the abilities and rights of all service members and higher ranked individuals are not permitted to take advantage of their positions. These characteristics serve military members well when they transition to health care facility leadership positions.

- **COMMITMENT TO A MISSION:** Members of the military are accustomed to doing mission-based work that they consider highly important. Many people working in health care feel the same way about their jobs, so former military members often fit into the health care culture well.

- **SOLID TRAINING:** Veterans who join health care facility departments are often well trained in their field and disciplined in their work habits. Military health care facilities typically have up-to-date technology and systems, so veterans coming from the military medical field are trained in managing that technology. Veterans trained in other areas, such as civil engineering or the trades, are also thoroughly trained, tested, and experienced. Furthermore, military training does not end with a service member’s formal technical school; they are required to take continuing education throughout their careers.

- **UNDERSTANDING OF REGULATIONS:** Military members are more accustomed to following regulations than the general public, which is beneficial in the regulation-heavy health care field.

- **WIDE RANGE OF EXPERIENCES:** Most military tours are two or three years, so military members change jobs frequently. This exposes them to a wide variety of facilities and situations.

- **ABILITY TO HANDLE STRESSFUL SITUATIONS:** Veterans, including those who have not seen combat, have been exposed to stressful situations and are accustomed to dealing with them. Many also
have worked in confined spaces—think submarines or aircraft—and know how to “defend in place” the way health care facility personnel do.

Some former military members face challenges integrating with the civilian world. They may find that the well-defined hierarchy they came to know in the military is more vague in a civilian job and that the process of giving and receiving orders is less defined. Also, veterans may be used to systems that are highly regimented—for example, the military procedures for purchasing are detailed and followed closely—and they may find it difficult to adjust to less regimented procedures. A thorough, well-developed onboarding process may ease that transition by showing military members how their new jobs differ from their military situations. Onboarding should move beyond the basics and dive into cultural issues, problem-solving processes, and career-advancement expectations and opportunities.

A health care organization can find qualified military members through veterans’ job fairs and a number of websites. One of these sites is operated by the U.S. Department of Labor: www.dol.gov/vets/hire. Additional sites can be found on the ASHE succession planning webpage at www.ashe.org/successionplanning.

- **Other health care organizations**: Naturally, quality people from other health care facility departments are potential future leaders for your organization. To identify these individuals, develop professional relationships through organizations such as ASHE or local ASHE affiliated chapters.

- **Non-health care organizations**: Facility personnel from outside of health care can make good candidates for health care facility leadership positions. Since health care organizations are widely regarded as good employers, attracting these individuals may not be difficult. You can learn about prospects from other fields through participation in organizations such as the International Facility Management Association (IFMA). Experienced facility personnel from non-health care organizations may be very skilled at their jobs, but they will need thorough orientation to the regulations that affect health care facilities, the mission of the organization, and other issues.

- **Trades**: Because health care organizations employ many tradespeople—from HVAC specialists to plumbers to carpenters—the trades have
historically been a valuable source for facility management personnel. Tradespeople sometimes begin as lower-level employees of the health care facility and rise into management, while in other cases they master their trade elsewhere and join the health care facility later in their career.

Individuals in the trades who have achieved journeyman status, which means they have completed an apprenticeship and are considered competent to work as a fully qualified employee, are well trained and understand the requirements of their field. This does not necessarily mean they are prepared for leadership, but it does mean they grasp the importance of following procedures and solving problems—both of which are important skills for leaders to possess.

Some challenges face tradespeople advancing to facility leadership. The formal education of tradespeople can sometimes be limited, and that can be a hurdle in a health care environment where degrees and certifications are highly valued. Tradespeople wishing to become facility leaders should consider at a minimum earning a bachelor’s degree in some appropriate field.

Furthermore, tradespeople who are experienced in their specialties may require training and mentoring to expand their scope of understanding to the broader view required of facility leaders. A well-established coaching or mentoring program can address this issue.

As with other individuals entering facility leadership, onboarding is essential. For tradespeople, onboarding to facility leadership should include information about the vast regulations affecting health care facilities, infection control issues, the patient experience, and other topics with which they may not be familiar.

• **Career fairs:** Don’t overlook normal career fairs for high school students, college graduates, and career-changing adults. Develop a strategy that introduces health care facility management to these individuals in an engaging fashion. Consider attending career days at local high schools. Most students probably will have never heard of the profession, and they may appreciate a new option. ASHE has a PowerPoint presentation available at [www.ashe.org/successionplanning](http://www.ashe.org/successionplanning) that facility leaders can use for this purpose.

• **Consultants:** Get help when you need help. If you aren’t sure where to find the right person for the job, remember that there are search firms and consultants who can help.
Challenges and Solutions to Succession Planning

Understanding the challenges of succession planning can help you avoid them. Challenges include:

DEFENSIVENESS: Good facility leaders realize the importance of preparing someone to take over when they retire or move to another position. Sometimes people are reluctant to train someone to do their job for fear that the organization will prefer the new person to them. When discussing succession planning with an employee, stress the reason behind the succession plan—such as keeping the department strong in case of transition—so they understand the purpose.

INADEQUATE ONBOARDING: When new employees start, sometimes they are not given the “big picture” of their organization and don’t see the possible paths to advancement. When that happens, they are not likely to get on the ladder to leadership. Onboarding also should help new employees or newly promoted employees understand the culture of the organization, the regulations that affect it, and the intensity of the organization’s mission. A thorough onboarding process is not a 30-minute pre-recorded video—it should involve a solid review of the organization, together with meetings with key individuals throughout.

In addition to normal employee and career issues, here are some key topics that should be addressed in onboarding for new facility employees:

- **Infection control procedures:** Infection control is essential in nearly every part of a health care facility, so understanding this issue requires extensive training.

- **Health facility regulations:** New health care facility managers are often overwhelmed by these requirements. Prepare new team members for these challenges during the onboarding process.

- **Nature of the customer base:** Health care facility managers need to be sensitive to the needs of patients. Patients are rarely in the health care facility by choice, so they are often unhappy and highly sensitive to their environment. New facility employees must understand that they will be most successful when they consider themselves part of the patient care team, not simply workers behind the scenes.

- **The intense mission of the organization:** Many health care employees are mission-driven individuals, and they place high demands on their environment and the people who create that environment. Nurses, doctors, and other clinicians expect their work spaces to be perfectly suited for patient care and safety.
INADEQUATE MENTORING: Mentoring is a key part of the preparation of future leaders, but few health care facility departments have formal mentoring programs. A leader in the facility department can help potential leaders understand the issues, the importance of relationships, the techniques of managing staff, and other leadership skills.

INADEQUATE ON-THE-JOB TRAINING: Successful leaders don't emerge out of thin air—they need to be familiarized with all aspects of the facility department, and they need training in certain aspects. When bringing in a new employee or training up an existing employee, be sure to incorporate the on-the-job training they need.

LONG TENURES OF CURRENT LEADERS: Loyal employees are great, but if the leadership in the facility department stays on the job decade after decade, future leaders are apt to jump ship and find opportunities at other organizations. This can be partially avoided by moving those employees into other departments, even if the moves are lateral, to keep their jobs interesting. On the other hand, moving from one health care organization to another is a good way for a candidate to broaden their experience.

POOR COMMUNICATION: Employees like to know what their future opportunities are with an organization. If the succession plan is poorly communicated, good employees may seek jobs with organizations that can provide a clearer advancement path. Human resources departments can help with communication.
Personal Career Development Planning

Succession planning goes hand in hand with personal career development planning. A good succession plan leads to the development of personnel, which in turn requires thorough personal career development of anyone on the path to the next level. Even if you are happy in your current position, you should be prepared for the future. Consider the next step on your career path—whether that’s inside or outside of your current organization.

Furthermore, personal career development planning is vital for anyone who wants to succeed in facility management regardless of whether they are included in a formal succession plan.

Steps in Personal Career Development Planning

Planning your career involves a number of steps, from assessing your own skills to creating a personal career road map.

ASSESS YOUR SKILLS: Look at the competencies listed on pages 26-28. Rate yourself on how you are doing in each of these areas. Talk to mentors or leaders to see how they would rate you in these areas and to see which competencies they believe are most important to your career goals. If your organization conducts 360-degree feedback, consider using that process to become more self-aware of strengths and weaknesses. When assessing your skills, be sure to consider skills you need for your current job and your potential next job, whether it is inside or outside your current organization.

REVIEW POSITION OPTIONS AND REQUIREMENTS: Every health care organization is a little different, but you can get a good idea about the skills needed for the various positions in the facility management field by reviewing the competencies listed on pages 26-28. Consider where you’d like to go in your career. Is your career path horizontal, meaning you add responsibility by picking up additional departments within the same health care organization?
Or is it vertical, meaning you move from a smaller organization to a similar position in a larger organization or system? Consider all options and determine where you want to go.

**ANALYZE GAPS:** Compare your skills from your self-assessment to the skills required for various positions. Where do the gaps exist? What skills, training, certifications, and experience are you lacking for the next step up in your career?

**FILL THE GAPS:** Take what you’ve learned from the gap analysis and talk to your supervisor. Show them that you are serious about taking the steps needed to advance, and seek their support. Can training be provided? Is there a budget for continuing education? Can employees attend ASHE educational events and report back to management on what they learned? Health care organizations often have tight budgets for continuing education. Make use of online and virtual education opportunities. As an example, ASHE offers many e-learning education courses that are completed entirely online. ASHE members have access to a plethora of webinars, recordings of conference presentations, alerts, monographs, and publications that help further personal knowledge. Many of these courses offer continuing education units (CEUs) so you can document learning activities. Take ownership of your career and make an investment in yourself by getting the experience and skills you need to advance.

**CREATE YOUR ROAD MAP:** Once you’ve determined what resources are available to fill your gaps, make a plan to access them. Set a timeline for completing the requirements for your next position. Even if it doesn’t seem like there will be an opening at that level for you at that time, it’s important to be ready when the opening emerges. You may even decide to pursue an opening at another organization to keep your career moving forward.

**Challenges and Solutions to Personal Career Planning**

Professionals in all fields may run into challenges while planning their careers, but health care facility management also includes the following unique challenges:

**TIMING:** Because health care organizations are generally known as excellent employers, people tend to stay in their positions a long time. This means openings, especially at higher levels, come less frequently than in many other fields, which makes it hard to predict when a position above you will become available. The best way to deal with that challenge is to make sure your supervisor and your human resources department are aware of your desire to advance so that you’ll be notified when those opportunities become available.
You also may want to keep your eye on similar positions at other health care organizations. Being able to take a job elsewhere may be necessary for your personal advancement.

**EDUCATIONAL OPPORTUNITIES:** The number of college courses in health care facility management is few, so getting the advanced training you need to fill your educational gaps may be difficult. However, you can work around that by asking your supervisor for more on-the-job training or by participating in ASHE educational opportunities.
Career Paths

Health care facility management positions have traditionally been “behind-the-scenes” jobs that don’t attract much attention at career fairs. Many facility professionals find their way to the career via other careers, a trade, the military, or facility management jobs in other fields. If you are looking for a career path in health care facility management, consider these routes:

**College Programs**

The limited number of formal college-level programs for health care facility management include:

**OWENSBORO COMMUNITY AND TECHNICAL COLLEGE, OWENSBORO, KENTUCKY:** This college provides an associate’s degree in health care facility leadership. The two-year program, which was developed in conjunction with ASHE and the Kentucky Society of Healthcare Engineers, includes some basic science and math classes, including algebra, chemistry, and biology as well as a number of classes that are specific to health care facility management, such as infection control and prevention; compliance, codes, and standards; and maintenance and operations. All of the classes are available online, and in-state tuition is offered to all students regardless of residence.

**PURDUE UNIVERSITY, WEST LAFAYETTE, INDIANA:** Purdue offers a bachelor’s degree in health care construction management through its School of Construction Management Technology. The program teaches construction methods and project management skills that are applicable to all types of construction and provides specialized training for health care construction, including courses on the regulations and risks involved in health care construction. The program also includes 800 hours of on-site construction work as part of its graduation requirements.
**BRIGHAM YOUNG UNIVERSITY, PROVO, UTAH:** Brigham Young offers bachelor’s degrees in construction management and facility and property management. The program is not specifically focused on health care, but it provides a well-rounded education in facility management, including courses on mechanical systems, managing high-performance buildings, sustainability and regulations, and many other related courses.

A degree, even though it may not be specific to the health care physical environment, will be of value in creating your career path. If one of the specific health care degree programs is not available to you, consider a degree in facility management, construction management, engineering, industrial engineering, business, or another discipline that helps prepare you for leadership positions that meet your career goals, and then supplement that education with immersion in ASHE education programs and courses to develop your own health care-specific body of knowledge.

**Internship Programs**

Internships are a great way to learn about an organization and the facility management field in general and to develop some basic competencies. Often interns are later hired as regular employees. A good place to start in your search for an internship is ASHE’s internship program, which connects students with programs at member facilities.

**Military**

The military is a valuable training ground for future health care facility leaders. The high quality training, discipline, and commitment to service in the military translate well to later careers in facility management. Of course, being in the military is a significant commitment and every military member, regardless of job, has the potential of being in very dangerous situations.

**Trades**

Many health care facility management personnel emerge from a trade; tradespeople include carpenters, HVAC specialists, and electricians. If you are already a tradesperson and would like to enter health care facility management, one possible avenue is to earn a college degree in a related field. Degrees and credentials are highly valued in the health care arena. Another possibility is to seek a lower-level trade position at a health care facility and work your way up to management.
Other Facility Management Positions

Another path to a career in health care facility management is through facility management positions in non-health care organizations. Every large building or campus has facility management personnel. Learning the facility management profession in a non-health care organization provides one with many of the skills needed in a health care situation. However, you will also need to learn the many issues specific to health care before or soon after joining a health care organization.

For facility managers who want to move to health care, consider learning more about:

**INFECTION PREVENTION PROCEDURES:** Infection prevention is essential in nearly every part of a health care facility, so understanding this issue is vital.

**HEALTH FACILITY REGULATIONS:** The codes and standards regulating health care facilities are often applied differently than those for non-health care facilities.

**NATURE OF THE CUSTOMER BASE:** Patients are rarely in the health care facility by choice, so they are often worried or apprehensive and highly sensitive to their environment. New facility employees must understand that they will be most successful when they consider themselves part of the patient care team rather than simply workers behind the scenes.

**THE INTENSE MISSION OF THE ORGANIZATION:** Many health care employees are mission-driven individuals, and they place high demands on their environment and the people who create that environment.
Job Requirements and Competencies

A person entering a career in health facility management begins with a level of knowledge but may not have significant leadership experience or engagement in the field. As their career progresses, they continue to build their knowledge through education and also develop leadership skills through experience and engagement in the field. Engagement can mean more involvement in activities within the organization or through organizations in the field such as ASHE and affiliated ASHE chapters. Getting involved can provide opportunity for leadership development, education, and interaction with other professionals in the field.

The continuum of professional development requires all three elements shown above—education, engagement, and leadership. These three elements of leadership development can be used in creating succession planning pathways within an organization and in developing personal career development pathways.

The following competencies are often associated with facility leadership positions. For more specific information, consider the following suggestions:

- Monitor ASHE Career Flash and other job postings for leadership positions in health facility management. Track the requirements and competencies for those positions.

- Talk to your supervisor or mentor about which competencies are most important for any jobs you are interested in.
Competencies

**TECHNICAL/SYSTEM KNOWLEDGE:** Understanding the various systems that keep health facilities operational is important. Facility managers don’t need to have technical skills in all areas, but they do need to understand how the systems work.

**COLLABORATION:** A health care facility department has many moving parts, and leaders must be able to collaborate with staff and external vendors and contractors working in the health care facility. The facility department is often expected to coordinate work according to the schedules of the other departments and to know precisely when and how maintenance can be performed.

**COMMUNICATION:** Communication is an essential part of leadership and is closely related to collaboration. Facility leaders must communicate well with their staff and other stakeholders and must have open lines of communication with all the other departments. Facility departments do not work in silos—their work touches every other department—so they must be in regular touch with others.

**ABILITY TO TRANSFORM:** Managers are good at keeping an organization moving along at a steady pace, but transformational leaders are skilled at advancing the organization. Transformational leaders are good at collaboration and communication, and they also have the ability to empower their employees so that change can take root at all levels of the organization. They also are talented at building relationships, engaging and inspiring staff, and marshaling the resources needed to get important tasks done.

**BUSINESS ACUMEN:** Facility department leaders must be able to run their departments like businesses. The mantra in health care organizations, including nonprofit organizations, is often “no margin, no mission,” which means the health care facility needs to make money to keep its doors open. The facility department is not a revenue-generating department, which puts even more pressure on leaders to keep costs in check. In addition to running the department efficiently, top leaders should be able to communicate to executives about the department and its needs.

**RESOURCE MANAGEMENT:** Resource management goes hand in hand with business acumen. Effective leaders ensure that resources are not being wasted, whether those resources are energy, staff time, or financial resources.

**PERSONNEL MANAGEMENT:** Good facility leaders know how to get the most out of their teams. This often means understanding what motivates staff.
What type of recognition matters to them? Do they value flexibility more than money? What are their hopes for the future? Does the mission drive them?

**CULTURAL UNDERSTANDING:** Hospitals and health systems have distinct cultures. The mission of a health care organization is intense and focused, and the people serving that mission take their jobs seriously. A successful facility leader understands the organizational culture and fosters a commitment to mission among her staff.

**DIVERSE TALENTS:** Finally, of course, health care facility leaders are multi-talented. Because they run departments that must successfully deal with scores of different systems, the most successful facility leaders have experience in these myriad systems and understand the demands of each.

**Certification and Designation Programs**

Certificate programs, certifications, and other credentials can serve as a reflection of mastery of various competencies. See Appendix D for a list of potential certifications and credentials appropriate for various facility positions.

Many management skills, often called soft skills, are critical for effective management. A person may have a mastery of technical competencies, knowledge of facility operations, and an in-depth understanding of codes and standards, but to be effective at leadership, a person must also have the soft skills that go beyond technical competencies.
Resources and Tools

All of the tools and resources featured in this monograph are available at www.ashe.org/successionplanning.

Additional resources and tools available on the site include:

- Information on ASHE education programs
- Sample job position summaries
- Succession planning worksheets (See Appendix A)
Appendix A: Sample Succession Planning Worksheet

**Note:** A Microsoft Excel version of this worksheet is available at [www.ashe.org/successionplanning](http://www.ashe.org/successionplanning).

**FACILITY MANAGEMENT SUCCESSION PLANNING WORKSHEET**

<table>
<thead>
<tr>
<th>Position Title</th>
<th>Incumbent</th>
<th>Criticality</th>
<th>Promotion Status</th>
<th>Retirement Eligible</th>
<th>Staff Ready to Assume Position</th>
<th>Staff Ready in 1-2 Years</th>
<th>Notes</th>
</tr>
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</table>

**Criticality**

1: **Critical** — Numerous qualifications, quick uptake.
2: **Very Important** — Fully functional within 3-6 months.
3: **Important** — Fully functional within 6-9 months.

**Promotion or Retirement Status**

A: Within 1 year
B: Within 2-5 years
C: Within 5-10 years
D: Within 10+ years
### Appendix B: Sample Job Competencies Matrix

**Note:** A Microsoft Excel version of this matrix is available at [www.ashe.org/successionplanning](http://www.ashe.org/successionplanning).

<table>
<thead>
<tr>
<th>Requirements &amp; Skills</th>
<th>Director</th>
<th>Manager</th>
<th>Supervisor I (HVAC)</th>
<th>Supervisor I (GEN)</th>
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</thead>
<tbody>
<tr>
<td>Job Requirements</td>
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<td></td>
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<tr>
<td>Education</td>
<td></td>
<td></td>
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<tr>
<td>Health Care Experience</td>
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<td>Certifications</td>
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<tr>
<td>Licenses</td>
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</table>

#### Department Skills

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<th>Director</th>
<th>Manager</th>
<th>Supervisor I (HVAC)</th>
<th>Supervisor I (GEN)</th>
</tr>
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<td>Organization Values and Goals</td>
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<tr>
<td>Goal Development</td>
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<td>B</td>
<td>B</td>
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<tr>
<td>Operational Budget Development and Management</td>
<td>A</td>
<td>B</td>
<td>B</td>
<td>B</td>
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<tr>
<td>Capital Budget Development and Management</td>
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<td>Energy Management</td>
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<td>A</td>
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<td>Personnel Resource Management</td>
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<td>B</td>
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<td>Strategic Planning</td>
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<td>C</td>
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<td>Emergency Planning</td>
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<td>B</td>
<td>B</td>
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<tr>
<td>Computer Skills (CMMP, BMP, Word, Excel, PowerPoint, etc.)</td>
<td>A</td>
<td>B</td>
<td>B</td>
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<tr>
<td>Contract Management</td>
<td>A</td>
<td>B</td>
<td>C</td>
<td>C</td>
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<td>Education and Training</td>
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<td>B</td>
<td>B</td>
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<tr>
<td>Departmental Policies and Procedures</td>
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</tbody>
</table>

**Job Skills**  
A = Essential/Required  
B = Knowledgeable  
C = Marginal

*(continued)*
<table>
<thead>
<tr>
<th>Requirements &amp; Skills</th>
<th>Director</th>
<th>Manager</th>
<th>Supervisor I (HVAC)</th>
<th>Supervisor I (GEN)</th>
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</thead>
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<tr>
<td>Leadership</td>
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<td>Communication</td>
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<tr>
<td>Visionary</td>
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<td>B</td>
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<tr>
<td>Team Building</td>
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<td>B</td>
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<tr>
<td>Delegating</td>
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<td>B</td>
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<tr>
<td>Problem Solving</td>
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<td>Networking</td>
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<td>Role Model</td>
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<td>Mentoring</td>
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<tr>
<td>Managing</td>
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<tr>
<td>Customer Service and Recovery</td>
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<tr>
<td><strong>Regulatory Skills</strong></td>
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<td>TJC EC Standards</td>
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<td>NFPA Codes</td>
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<td>OSHA Requirements</td>
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<td>State Health Care Codes</td>
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<td>EPA Requirements</td>
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<td><strong>Construction Skills</strong></td>
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<td>Plans and Specification Knowledge</td>
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<td>AIA Documents</td>
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<td>Methods Knowledge</td>
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<td>Product Use and Knowledge</td>
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<td>ICRA Knowledge and Implementation</td>
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<tr>
<td>ILSM Knowledge and Implementation</td>
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</table>

*Job Skills*  
A = Essential/Required  
B = Knowledgeable  
C = Marginal
Appendix C: Position Summaries

Position summaries are an important element of succession planning. The position summaries, combined with the organizational chart, define the positions that the succession plan needs to address.

Position summaries are typically more in-depth than job or position descriptions. Position descriptions, which are often generated by the human resources department, provide some basic information about a position. However, a majority of a position description is boilerplate language that applies to anyone working at a given company.

In contrast, position summaries offer a more in-depth view of the position and the person who should occupy the position. The position summary makes clear the requirements and characteristics of the ideal candidate for a position. That’s what makes it so valuable in succession planning. The key elements of a position summary include:

- The basic role of the position
- Area of responsibility/scope of authority
- Primary challenges faced by the position
- Specific competencies required
- Hard skills needed (engineering degree, code knowledge, etc.)
- Soft skills needed (ability to communicate well, managing up, etc.)
- Other qualifications
Steps to Creating the Summary

A key first step to creating the position summary is to interview the incumbent in that position and learn as much as possible about the job. Questions to ask include:

- What do you do?
- What tough challenges do you face in the job?
- What are the easier parts of the job?
- Who are your customers?
- What competencies do you use in your job?
- What education is required for your job?

Another step may be to interview other people in the chain of command about that position. Their input can round out the requirements for the position, and help clarify the connections among the positions.

Sometimes these interviews are best done by a person who is outside the chain of command, such as a succession committee member from another department or an outside consultant. Such a person can sometimes elicit information that a person's boss or direct co-workers may not be able to obtain.

Once the information is gathered, a position summary can be written with the following sections:

- **Position description**: Specific tasks of the job, the reporting structure, what role the person plays in leadership, and so forth
- **Specific competencies**: Soft skills, such as credibility and diplomacy, and hard skills such as engineering ability
- **Primary challenges**: Key projects the person in the position must deal with for the job
- **Qualifications**: Education, experience, certifications, and other qualifications that the person is expected to possess

**Example**

The following example is a position summary for a job in a regional hospital. Additional examples can be found at www.ashe.org/successionplanning.

**Sample Position Summary:**
Director of Facility Management

Organization

The regional hospital is a 250-bed regional hospital and integrated delivery system providing medical services in virtually every medical specialty. The 400,000-square-foot hospital is located in Anytown, U.S.A., and employs nearly 2,000 people on a full-time or part-time basis.

The hospital is independent but collaborates extensively with other area facilities to provide patient-focused, state-of-the-art care and treatment. More detailed information about the hospital is available online.

Position description

Reporting directly to the organization’s CEO, the director of facility management is directly accountable for the organization, direction, and leadership of facility operations and support of the institution’s physical assets. The director will be responsible for regulatory compliance initiatives relating to local, state, and national accreditation and code requirements, as well as construction planning and project management.

The scope of activities includes development of short- and long-range capital investment strategies; implementation of capital infrastructure initiatives; oversight, tracking, and benchmarking of energy conservation programs; and utilities management and performance. The director will have a critical role in planning and construction.

Additionally, the director will have the responsibility of assessing the current service delivery and customer interface of the facility department. Skill mix, role scope, and staffing levels will be evaluated in the context of current institutional activity levels and will be the responsibility of the director.

Specific competencies

The successful candidate will:

- Demonstrate high levels of credibility, diplomacy, communication, and integrity
- Communicate effectively at many levels, including to facility staff and hospital leadership
- Bring a style that is effective in a collaborative department
- Be visible and accessible to a varied customer base
• Understand the principles of health care facility development to ensure an attractive and clinically efficient environment for patients, visitors, and staff

Primary challenges:
Among the opportunities within the function, the successful candidate will:

• Lead ongoing change management initiatives at the departmental level
• Provide operational support to a large and complex customer base
• Develop departmental succession plans to enhance transfer of information
• Deliver leadership and direction to the department staff
• Assist in the continuing development and success for the hospital

Qualifications
The hospital is seeking an exceptional leader who brings a management style that creates a culture for success through teamwork and collaboration. This important trait, supported by solid technical knowledge, will be a critical attribute of candidate selection.

The successful candidate will possess a bachelor’s degree in an appropriate discipline closely related to institutional facilities operations, engineering, or business management. Additionally, 5 to 7 years of demonstrated leadership experience in a health care organization is required, and CHFM certification is required. The candidate should have proven competencies in financial management and leadership initiatives in a complex and dynamic environment.

Enticements
Along with the high visibility of this position, the opportunity exists to produce positive results, and these accomplishments will be acknowledged organizationally. The opportunity to facilitate the growth of a new generation of facility support will provide professional challenges and recognition in the field. With strong leadership in place, the successful candidate will share in a strong vision for the hospital and assist in its implementation.
Appendix D: Certifications and Credentials

The following certifications and credentials may be helpful for health care facility leaders, depending on their specific roles and responsibilities:

**CHFM: Certified Healthcare Facility Manager**
- Provides pride of recognition of being among the elite in a critical field of health care. This program promotes health care facility management through certification of qualified individuals in the field.
- Offered by the American Hospital Association Certification Center

**CHC: Certified Healthcare Constructor**
- Provides pride of recognition of being among the elite in a critical field of health care. This program provides a sound assessment that allows for distinction in a competitive marketplace.
- Offered by the American Hospital Association Certification Center

**CHSP: Certified Healthcare Safety Professional**
- Established to focus on the importance of using management principles to improve the safety performance of health care organizations.
- Offered by the International Board for Certification of Safety Managers (IBCSM)

**CFM: Certified Facility Manager**
- This certification ensures the knowledge and competence of facility managers.
- Offered by the International Facility Management Association (IFMA)
CHEP: Certified Healthcare Emergency Professional

- The professional certification for health care emergency directors, managers, coordinators, associates, consultants, and others who work in this sector.
- Offered by the International Board for Certification of Safety Managers (IBCSM)

CCE: Certified Clinical Engineer

- Certification administered by Healthcare Technology Certification Commission and the United States and Canadian Board of Examiners for Certification in Clinical Engineering.

PE: Professional Engineer

- A four-year degreed professional who worked under a PE for four years, passed competency testing, and earned a state license.
- Offered by the National Society of Professional Engineers (NSPE)

RPA: Registered Professional Architect

- A four-year degreed professional with appropriate architectural experience who has passed the ARE® (Architect Registration Examination).
- Offered by the National Architectural Accrediting Board (NAAB)

CEM: Certified Energy Manager

- The first recognized program under the Better Buildings Workforce Guidelines, a collaboration between the U.S. Department of Energy and the commercial energy performance industry.
- Offered by the Association of Energy Engineers (accredited by ANSI)

CPM: Certified Property Manager

- A certification that demonstrates expertise and integrity for asset and property managers.
- Offered by the Institute of Real Estate Management (IREM)
HFDP: Health Facility Design Professional

- A certification that demonstrates competency in critical health care design knowledge, skills and abilities.
- Offered by ASHRAE

RPM: Real Property Manager

- A professional designation for people who work in property management.
- Offered by the Building Owners and Managers Institute (BOMI)

SMA: Systems Maintenance Administrator

- A designation for those who are in charge of a team of technicians who run the day-to-day operation of a building. The SMA has the knowledge to streamline the operations of a building so that it is energy efficient, environmentally sound, and cost effective.
- Offered by the Building Owners and Managers Institute (BOMI)

CBET: Certified Biomedical Equipment Technician

- A certification that demonstrates that holders have the knowledge to ensure a safe, reliable health care environment.
- Offered by the Association for the Advancement of Medical Instrumentation (AAMI)

CPMM: Certified Professional Maintenance Manager

- A certification that validates in-depth expertise in plant and facility maintenance management; allows for the holder to remain current with the evolving techniques and technologies in maintenance management.
- Offered by the Association for Facilities Engineering (AFE)

CPE: Certified Plant Engineer

- A certification that demonstrates expertise in all areas of plant/facility engineering. It provides a standard of professional competence in the plant/facility engineering and management field.
- Offered by the Association for Facilities Engineering (AFE)
CCIM: Certified Commercial Investment Member

- This certification represents proven expertise in financial, market, and investment analysis in the commercial real estate industry. CCIM designees are recognized as leading experts in commercial investment real estate.
- Offered by the CCIM Institute

PMP: Project Management Professional

- A highly recognized certification for project managers, the PMP signifies that you understand project management.
- Offered by the Project Management Institute (PMI)

NICET certifications: National Institute for Certification in Engineering Technologies

- The National Institute for Certification in Engineering Technologies is a division of the NSPE (National Society of Professional Engineers). NICET offers many technician certification programs in civil engineering and electrical and mechanical systems engineering technology.

NFPA certifications: National Fire Protection Association

- The National Fire Protection Association offers a wide variety of certification programs ranging from Certified Electrical Safety Worker (CESW) to Certified Life Safety Specialist (CLSS-HC) for Health Care Facility Managers. These certifications allow for professional recognition, demonstration of competence, and commitment to the profession.