



# Succession Planning in Facility Management

Pilot Study and a Roadmap for the Future





## International Facility Management Association

Founded in 1980, the International Facility Management Association (IFMA) is the world's largest association for facility management professionals, supporting more than 22,000 members in more than 100 countries. This diverse membership participates in focused component groups equipped to address their unique situations by region (138 chapters), industry (16 councils) and areas of interest (six communities). Together they manage more than 839 billion square feet of property and annually purchase more than US\$774 billion in products and services.

IFMA is a key contributor to the development of international FM standards and works with decision makers globally to inform and shape FM-related policy. IFMA provides career resources and continuing education, offers three industry-respected credentials, maintains the largest repository of FM-related content on the web and hosts year-round global events.

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# Executive Summary

The facility management profession has faced labor workforce challenges for years. However, preliminary results from recent IFMA studies have revealed seismic shifts in FM workforce demographics, with an influx of newer and younger professionals. These changes highlight the need to capture and disseminate institutional knowledge from seasoned professionals to incoming facility managers. IFMA commissioned a pilot project to explore succession planning with three main objectives: 1) prepare a high-level definition of FM succession planning, 2) broadly understand the use of succession planning tools in FM and 3) identify the preferred FM succession planning tools moving forward.

The study revealed that participants define succession planning as the process of evaluating the current workforce and identifying employees with the potential to advance to senior-level positions. Some respondents suggested that effective FM succession planning broadly considers talent acquisition (externally, depending on the situation) while training employees for their current functions and for future job opportunities within the organization. Respondents also indicated that the most common method for training facility technicians/trades is through partnerships with professional organizations (i.e., webinars, workshops) and informal (i.e., unstructured, spontaneous learning that is not assessed or tracked) on-the-job training. For management staff, expected jobs skills should be documented, although they may be less technically focused.

The next phase of this project is to develop a suite of tools that will enable facility professionals to identify the skills, talents and personality profiles needed in the FM workforce. To participate in the next phase of research, please contact Nickalos Rocha at [nickalos.rocha@ifma.org](mailto:nickalos.rocha@ifma.org).



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# Introduction and Problem Background

The facility management profession has faced labor workforce challenges for years.<sup>1</sup> However, preliminary results from IFMA's Salary and Pay Compensation Study revealed an influx of newer professionals in the workforce. Though the reasons for these changes are currently undergoing further analysis, the efforts of the IFMA Foundation, IFMA, various academic programs and other support from the industry are commendable. These changes highlight the need to capture and disseminate institutional knowledge from seasoned professionals to incoming facility managers.

Experienced executives are becoming more difficult to find in the construction industry/built environment<sup>2</sup> and the challenges in building the workforce have broad, sweeping impacts.<sup>3</sup> Previous studies have found that the following practices are most important in achieving the highest levels of satisfaction with succession planning:<sup>4</sup>

1. Analyzing and selecting high-quality candidates to take over executive leadership.
2. Securing senior-level support of the new candidates (and the plan for transition).
3. Preparing a plan for succession.
4. Maintaining high levels of communication between the new leadership and the previous leadership.
5. Developing and communicating clear responsibilities, especially after the new leadership takes over.

**Inadequate knowledge transfer tools** pose a significant obstacle, especially for professions undergoing shifts in core demographics and experience levels — like facility management. Many organizations face reduced efficiency, inhibited innovation and limited opportunities to pursue strategic growth.<sup>5</sup> While the typical approach is to promote mid-level employees to senior positions, this is a temporary fix. The FM industry relies on the knowledge of experienced professionals, and the transfer of this knowledge before senior-level professionals retire or leave the industry.



**The loss of experiential knowledge of retiring facility professionals should be of paramount concern to all.**

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1 Sullivan, K., Georgoulis, S. W., & Lines, B. (2010). *Empirical study of the current United States facilities management profession*. *Journal of Facilities Management*, 8(2), 91–103.

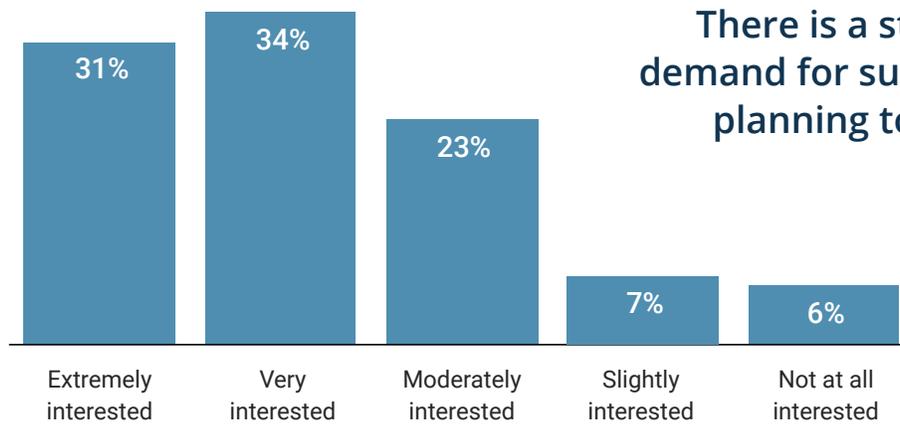
2 Perrenoud, A. J., & Sullivan, K. T. (2016). Analysis of Executive Succession Planning in 12 Construction Companies. *International Journal of Construction Education and Research*, 0(0), 1–17. <https://doi.org/10.1080/15578771.2016.1143892>

3 Chavez, J. (2011). The case for succession planning. *Strategic Finance*, 92(8), 15–16.

4 Perrenoud, A. J., & Sullivan, K. T. (2016). Analysis of Executive Succession Planning in 12 Construction Companies. *International Journal of Construction Education and Research*, 13(1), 64–80. <https://doi.org/10.1080/15578771.2016.1143892>

5 Construction Industry Institute (CII). (2013). *Transferring Experiential Knowledge from the Near-retirement Generation to the Next Generation* (No. 292–1). University of Texas at Austin.

**Figure 1:**  
Facility managers’  
interest level  
in succession  
planning resources



**There is a strong  
demand for succession  
planning tools!**

This is a unique opportunity to position IFMA as a global resource for succession planning, knowledge management and end-to-end career educational opportunities in facility management. IFMA surveyed facility professionals on their interest in “succession planning guides, checklists and tools” specific to FM (see Figure 1), and 87% of the almost 3,000 facility professionals surveyed indicated moderate to extreme interest in resources or tools to help transfer knowledge to successors.

Some organizations have focused on enhancing internal training and retainment initiatives. These programs typically focus on technical skills (i.e., how to perform the core tasks of their job better) and may also seek to enhance soft skills (i.e., leadership and team collaboration). A study of 400 commercial general contractors found that a third use personality profiles to improve their abilities in hiring, leadership and job assignment.<sup>6</sup> In a follow-on study of sheet metal and air conditioning professionals, the highest performing project managers exhibited the following characteristics:<sup>7</sup>

- ▶ Less extroverted and more reserved in communication with their peers and subordinates;
- ▶ Lower levels of fearfulness (i.e., greater resiliency);
- ▶ Prefer to address disagreements directly with those involved in the situation;
- ▶ Rely on proven strategies that solve problems (as opposed to “new and innovative” ideas)

While these studies were focused primarily on “construction enterprises”, the workforce demographics and challenges share many commonalities with the facility management profession.

6 Childs, B. R., Weidman, J. E., Farnsworth, C. B., & Christofferson, J. P. (2017). Use of Personality Profile Assessments in the U.S. Commercial Construction Industry. *International Journal of Construction Education and Research*, 13(4), 267–283. <https://doi.org/10.1080/15578771.2016.1246493>

7 Maali, O., Lines, B., Shalwani, A., Smithwick, J., & Sullivan, K. (2022). Distinguishing Human Factors of Top-Performing Project Managers in the Sheet Metal and Air Conditioning Trades. *EPIC Series in Built Environment*, 3, 130–138. <https://doi.org/10.29007/lxdh>

# Research Method

A pilot survey was developed based a literature review and expert feedback. It was distributed to facility management (FM), human resource (HR) and business operations (BO) executives in a variety of industries in March 2022 to secure feedback on FM succession planning. There were a total of 22 respondents, 16 FM and 6 HR/BO.

There was consensus that succession planning is the process of 1) assessing the status of the internal workforce and 2) identifying employees with potential to transition to more advanced jobs if/when vacant. More than 80% of respondents believe that 3) finding new/external talent to fill vacant, or soon to be vacant, jobs, 4) training employees to achieve competency for current jobs and 5) training employees to achieve competency for future jobs are additional succession planning processes (Figure 2). Although these final three processes impact succession planning, they may fit more accurately within recruitment or training/development, which might explain the lack of consensus.

**Figure 2:**  
Percent of respondents  
agreeing that process is  
part of succession planning

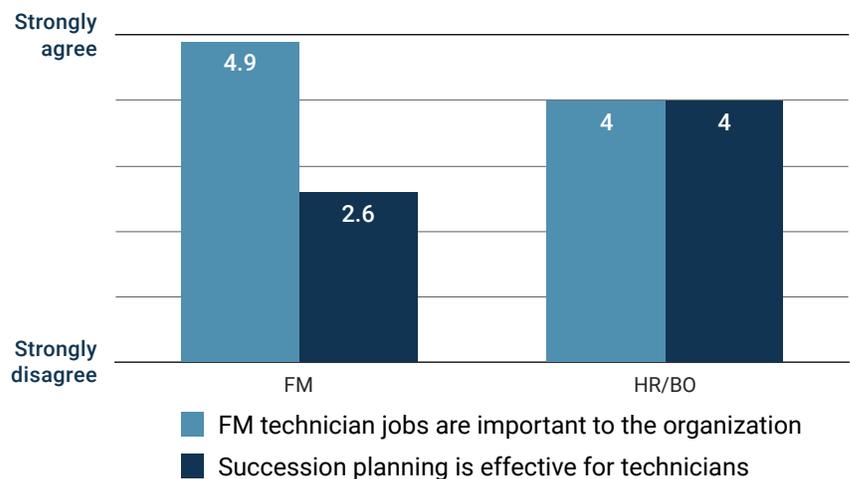


## Data Analysis – Facility Technician/Trade Workforce

There was strong agreement among FM respondents that facility technician/trade jobs are critical to organizations, with an average score of 4.92 out of 5 (Likert scale from 1 as strongly disagree to 5 as strongly agree). While there was agreement that this type of job may cause meaningful business disruption if vacant, the average FM respondent disagreed that their organization is effective at facility technician/trade succession planning with an average score of 2.6 (Figure 3). In contrast, HR/BO respondents only somewhat agree (average of 4.0) that facility technician/trade jobs are critical to business and believe their organizations are effective at succession planning for this type of job (average of 4.0).

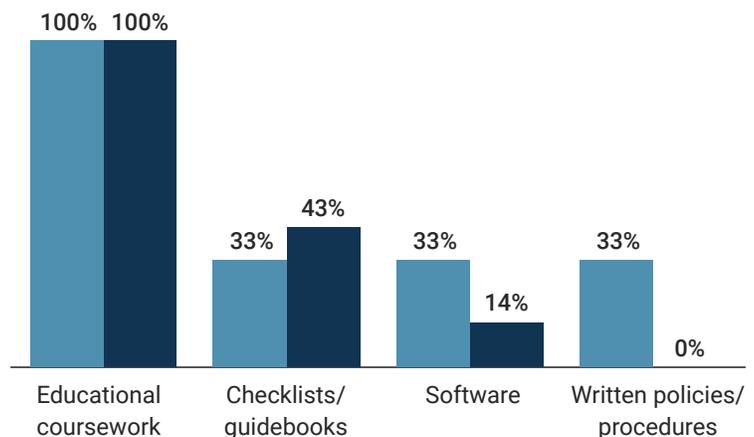
Organizations with effective facility technician/trade succession planning (at least 50% of respondents), primarily use educational courses/programs - also the most desired tool for organizations struggling with succession planning for this job type (Figure 4). Respondents also indicated that the most common method for training facility technicians/trades is through partnerships with professional organizations (i.e., webinars, workshops) and informal (i.e., unstructured, spontaneous learning that is not assessed or tracked) on-the-job training (Figure 4).

**Figure 3:**  
Percent of FM respondents agreeing that their organization is effective at facility technician/trade succession planning



**Figure 4:**  
Percent of respondent's use or desired use of facility technician/trade succession planning tools

■ Currently using ■ Desired use



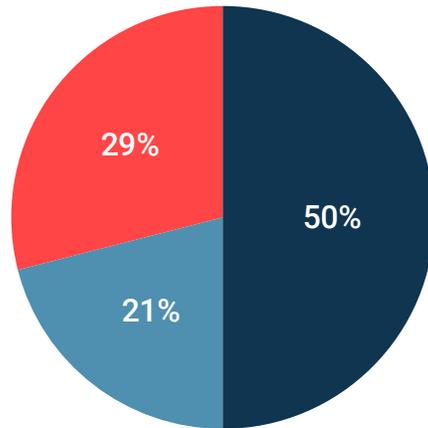
## Data Analysis – Facility Management Workforce

Like with the facility technician/trade workforce, there was again strong agreement among FM respondents that facility management jobs are critical, with an average score of 4.9 out of 5 (Likert scale from 1 as strongly disagree to 5 as strongly agree). FM respondents agreed that their organization is more effective at facility management succession planning than facility technician/trade planning, with an average score of 3.2. Among FM respondents (Figure 5), there appears to be a more favorable view of facility management succession planning than succession planning for technician/trade jobs.

HR/BO respondents only somewhat agree that facility technician/trade and management jobs are business critical (average score of 4.0 and 3.8, respectively out of 5) and they neither agree nor disagree that their organizations are effective at succession planning for these roles (average score of 3.0 and 3.2, respectively). It is proposed, then, that a relationship exists between effectiveness of succession planning for a specific job type and its level of importance to the business (see Figure 6).

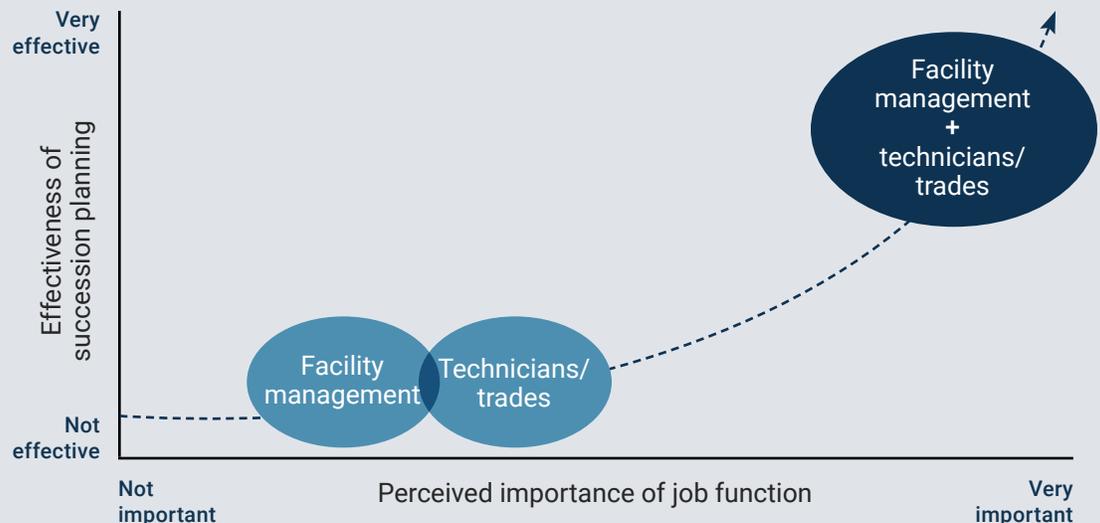
**Figure 5:**  
Percent of FM respondents agreeing that their organization is effective at facility management succession planning

- Agree
- Neither agree nor disagree
- Disagree



Among FM respondents, there appears to be a more favorable view of facility management succession planning than succession planning for technician/trade jobs.

**Figure 6:**  
Relative effectiveness of succession planning and perceptions of job function business criticality



Additional research is warranted to understand reasons for the apparent difference between FM and HR opinions regarding importance of facility jobs, including nuances by job level. For example, HR professionals' opinions of FM succession may be skewed by current challenges around senior-level FM recruitment and development compared to the comparative ease of recruiting entry-level FM talent (i.e., FM executives are not responsible for recruiting and developing their own roles). Furthermore, the future development of succession planning tools should consider the type of role it aims to support and the dynamics around succession planning accountability and control within organizations.

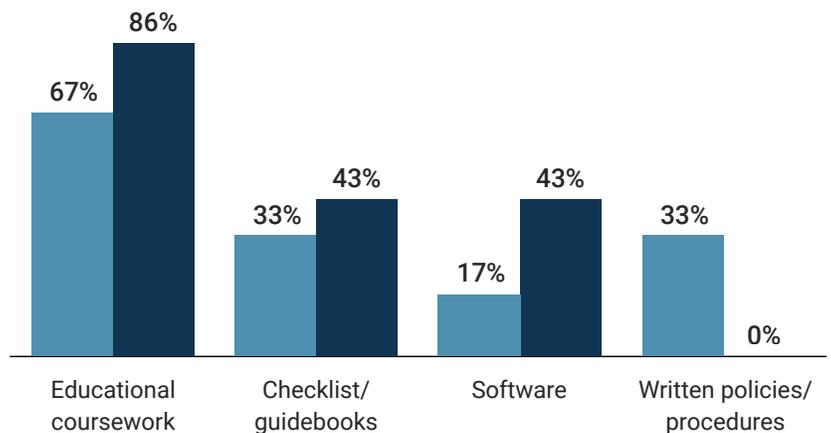
Like organizations with successful facility technician/trade succession planning, the primary tools used for facility management are educational courses/programs (Figure 7). The most desired tool for organizations struggling with FM succession planning is educational courses/programs, with a relatively strong interest in checklists/guidebooks and software. The most common way organizations currently develop facility management and technicians/trades is through partnerships with professional organizations (i.e., webinars, workshops) and informal (i.e., unstructured, spontaneous learning that is not assessed or tracked) on-the-job training (Figure 8).

The most desired tool for those organizations struggling with facility succession planning is educational courses/programs.



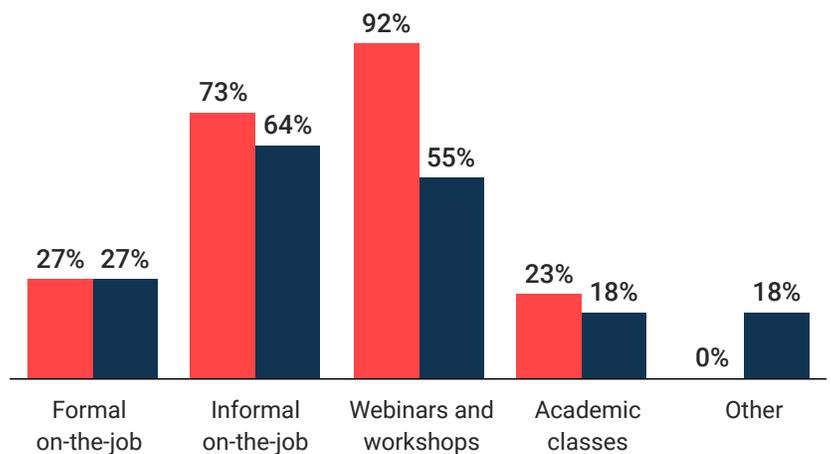
**Figure 7:**  
Percent of respondent's use or desired use of facility management/trade succession planning tools

■ Currently using ■ Desired use



**Figure 8:**  
Percent of respondent by delivery model for facility management and technician/trade training

■ Management ■ Technician/trade



# Subject Matter Expert Interviews

The research team conducted interviews with three succession planning experts. The interviewees had experience in 1) executive facilities leadership at a university, 2) facilities consulting and workforce development and 3) human resources and corporate real estate at a large transportation services company. The interviews reinforced the survey results as they provided responses to the following foundational questions:

- ▶ What does succession planning mean to you?
- ▶ Where do you see the greatest need for succession planning within the facility workforce?
- ▶ What differences do you see between succession planning approaches for technical or management workforce in facilities?
- ▶ Facility leaders seem to agree that succession planning is critical to their organization, but very few appear to be putting it into practice: why do you believe this is the case?

The experts indicated that FM leaders are concerned about both facility trade and management workforce shortage/attrition. Although there may be barriers within specific organizations for facility workforce succession planning, limited succession planning implementation is likely related more to a lack of understanding the process or feelings of inadequate resources such as time. Even if there wasn't a shortage of skilled labor, the uniqueness of each facility will always require a commitment to internal onboarding that takes a lot of time and effort.

The experts also talked about how documentation is needed so that technical staff understand the skills and expectations for success in their current job and what is needed for advancement. This documentation can be developed from skill lists published by government entities or feedback from internal staff and/or unions.

For management staff, expected job skills should also be documented, although they may be less technically focused. Mentorship is key for management development; FM leaders believe this topic should be stressed more throughout the profession, to improve organizational support of mentoring programs and individual training on becoming an effective mentor.

Organizations should continually assess and track data around workforce and succession planning, including key indicators around attrition, vacancies, age, retirements, etc. to identify workforce risks and opportunities. This should be done in close partnership with human resources.

Experts also agree that facility leaders should become more aware of existing programs available to support succession planning, like [SkillBridge](#) where military personnel can work at private companies for the last 6 months of their military service and have salary covered by the DOD. As vocational schooling declines, facility leaders should consider developing internal apprentice programs to provide basic technical skills to create expand recruitment sources.

# Next Steps and Future Roadmap

The results of this study have highlighted the critical and immediate need to provide succession planning tools. The cost in frequently hiring, training and retraining staff due to attrition or relocation is extremely high, often resulting in a perpetual state of workforce instability. Simply put, these challenges are all centered on cultivating a talented facility workforce. The research clearly indicates the need for facility executives to focus on knowledge transfer practices combined with the “human dimensions” of the FM workforce. To this end, IFMA is embarking on a multi-phase effort to begin developing a suite of tools focused on enabling facility professionals to identify the skills, talents, and personality profiles needed (see Figure 9).

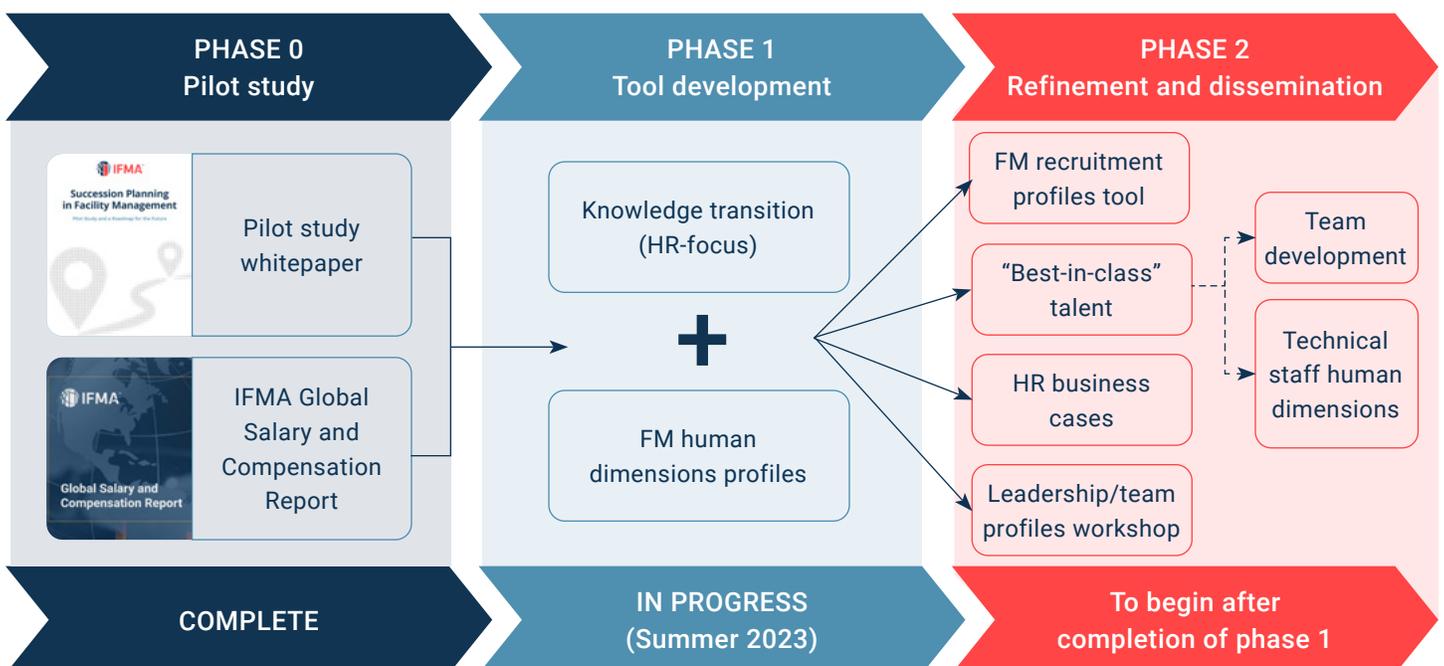
This pilot studies initial results highlight broad areas of interest and need with respect to Succession Planning:

- ▶ Assessing staff to understand human resource needs (i.e., retirement timeframes by workgroup, historical and contemporary recruitment sources, pay competitiveness, etc.)
- ▶ Measuring and analyzing recruitment, retention and succession results with key indicators
- ▶ Creating career path guides to facilitate technical staff development and advancement
- ▶ Developing a mentorship program to facilitate management development and career advancement
- ▶ Exploring external programs supporting facility workforce recruitment and succession including colleges & universities, apprenticeships, government programs (i.e. DOD SkillBridge), etc.



**These challenges are all centered on cultivating a talented facility workforce.**

Figure 9:  
Succession planning tool development phases



# Conclusions

There is high demand for tools and programs that can improve the effectiveness of facility workforce succession, for both technical and management roles. Tools and programs to improve facility workforce succession should include the following in order of priority:

1. Assess state of internal workforce
2. Identify high potential employees
3. Recruit new external talent
4. Train staff competency for current job
5. Develop staff competency for future jobs

Specific tools recommended to further develop the workforce as part of this pilot study are succession planning workshops and/or guidebooks that include, but are not limited to:

- ▶ How to assess the facility workforce, including tracking and analysis of key indicators
- ▶ How to use human dimension/identification tools to identify high potential facility staff for future roles
- ▶ How to create career path tools to support technical facility staff career advancement
- ▶ How to create internal training programs within a facility department
- ▶ How to best deliver on-the-job training within a facility department
- ▶ How to create mentorship programs within a facility department
- ▶ How to be an effective mentor to the facility workforce
- ▶ How to leverage government programs to support facility succession planning (case studies)

A new resource is being developed to measure the human dimensions of the most successful facility professionals. This tool help identify future hires, retain existing talent and assign responsibilities to optimize resource use. Additionally, market adoption of succession planning tools will depend upon the perception of the business impact by the person (s) within the organization formally or informally accountable for succession planning.