

# Operational Handover Best Practices

## Day One Resiliency in Facility Operations

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# Resiliency

- 1. The ability of something to return to its original size and shape after being compressed or deformed.**
- 2. An ability to recover from or adjust easily to adversity or change.**

**Source:** [RESILIENCY Definition & Meaning - Merriam-Webster](#)

# Mark Mochel, MBA, CHFM, SASHE, ACABE



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Mark Mochel is currently a Strategic Account Executive at Brightly, a Siemens company. Before joining Brightly, he was a Co-Founder and Senior Vice President at Facility Health Inc., where he was instrumental in introducing new infrastructure investment solutions and benchmarking capabilities to the healthcare industry.

Mark has a bachelor's degree in mechanical engineering from Purdue University, an MBA from The University of Michigan, and has held executive leadership roles in multiple industries, providing a unique perspective on the challenges facing healthcare facility management today. As an advocate for increased infrastructure investment in our industry, and a member of the ASHE National Advisory Board, Mark is passionate about sharing his experience with all who serve and are served through the environment of care.

# Shay Rankhorn, CxA, FASHE, FTHEA, CHFM, CHC, CHSP, CHEP



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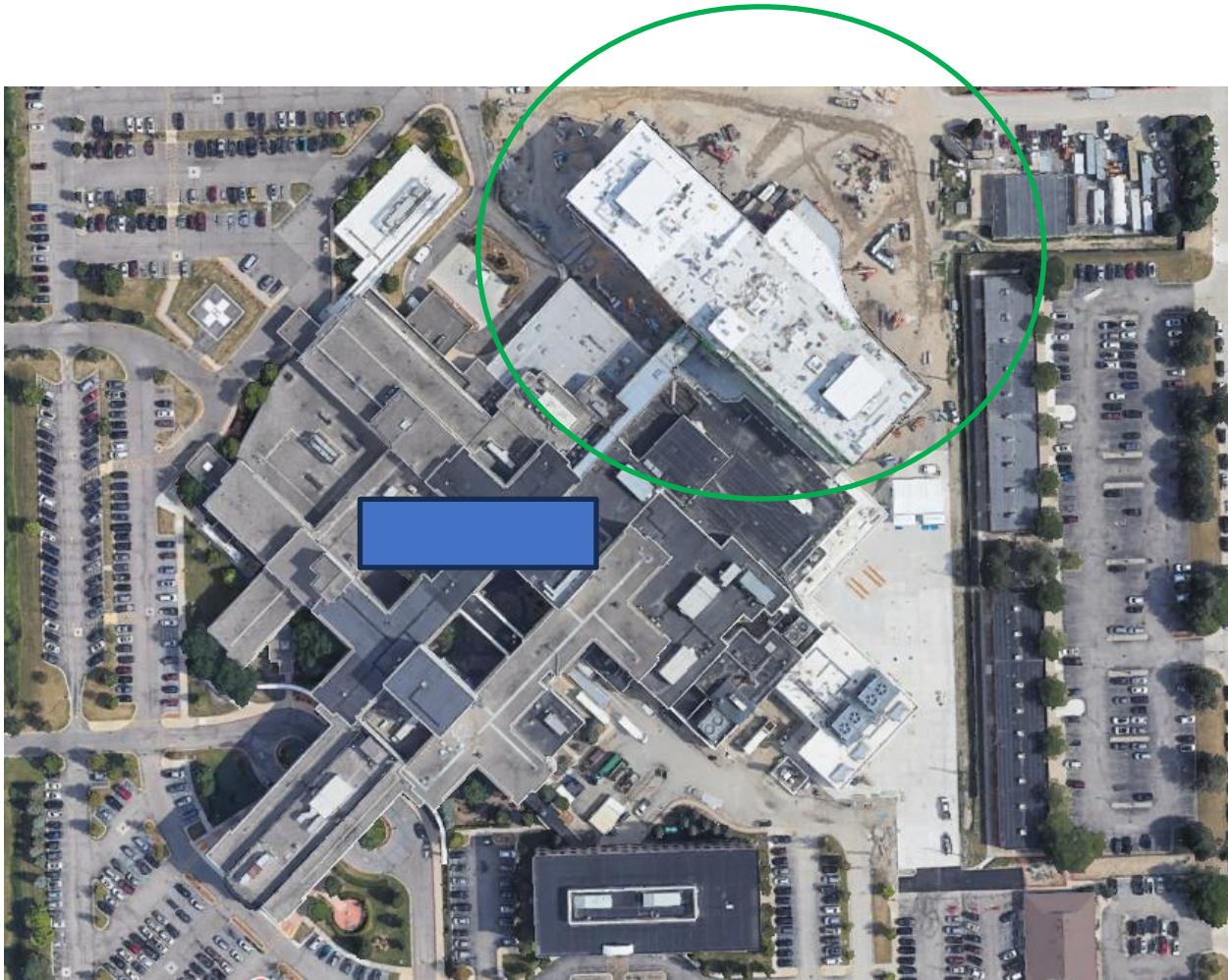
Shay Rankhorn is a strategic leader with over 25 years of experience in facilities, design, and construction management. As a partner at Facility Diagnostics, Shay oversees daily operations, strategic planning, and a portfolio of more than 100 projects, including commissioning services, facility assessments, mock surveys, and master planning. His career includes collaboration with leading organizations like HCA, Ballad Health, Lifepoint, Triad, CHS, and Norton Healthcare.

Previously, Shay served as the 2022 ASHE President and the V.P. of Facilities and Construction Management at Quorum Health, managing capital planning, project delivery, and daily operations for 22 hospitals.

# Learning Objectives (Condensed)

1. Understand and define Strategic Asset Management (SAM) and review the concept of life cycle asset management.
2. Demonstrate an asset management framework that defines the relationship between PDC and FM teams, using asset inventory as the common link.
3. Provide a case study example of best practices and results from an informed operational handover.
4. Utilizing a defined asset-driven framework for facility business planning, including continuous improvement opportunities to increase resiliency in facility operations. From Day One.

# Back Story



- **October 2023:** New bed tower Completed – Certificate of Occupancy
- **June 2024:** Urgent request for an inventory validation and asset tagging service.
  - No information updates in CMMS since the beginning of construction.
- **October 2024:** Accreditation survey window begins. 3 months to establish baseline CMMS records.
  - Rapid mobilization, inventory validation, etc.
  - Constructed PM Library, established work orders, etc.
- **How can this happen?**

# Why?

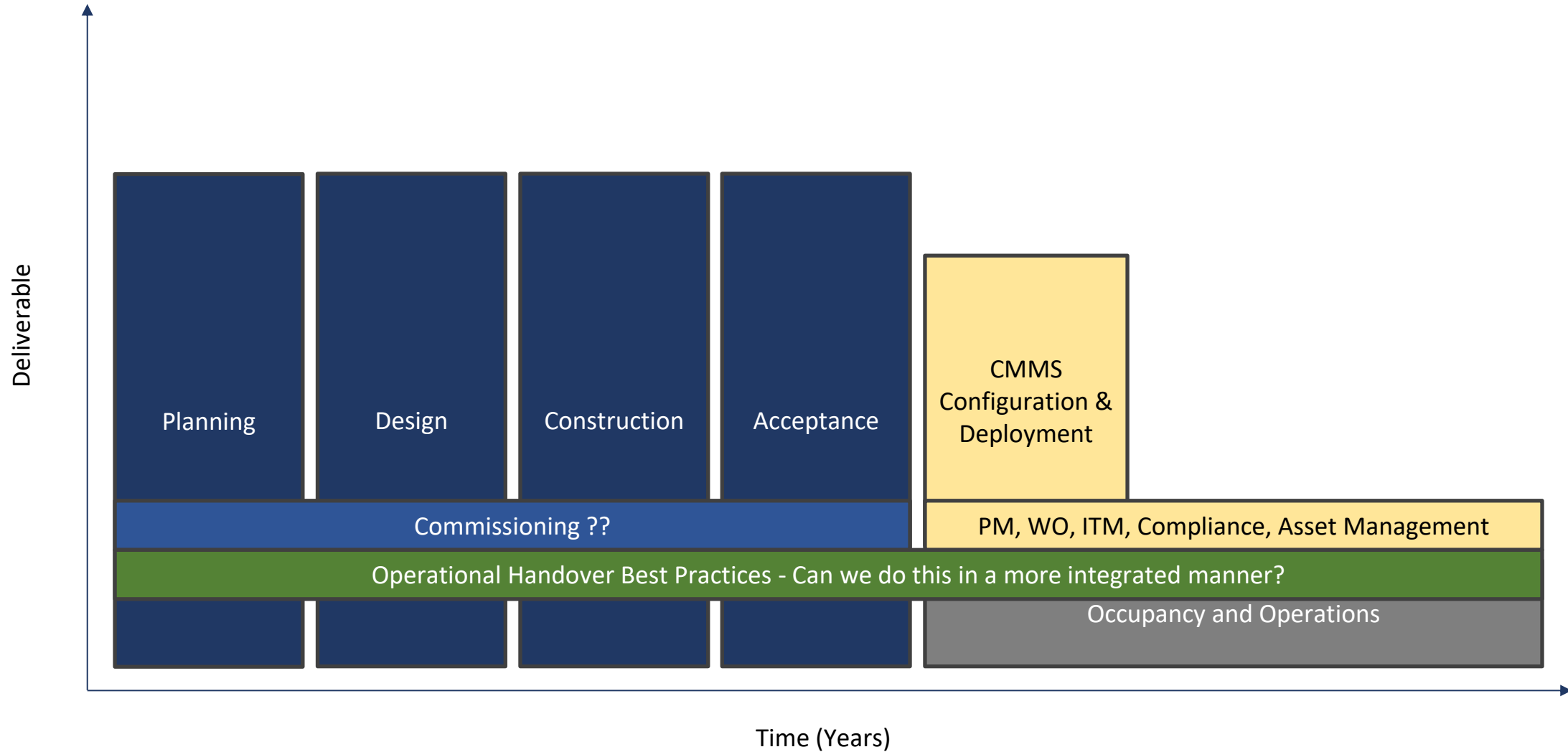
- Organizational Changes, System Changes, Pandemic Impacts.
- Beautiful Facility, Well Designed, Well Constructed.
- Value Engineering Reduced Cx Funding – Cx Agent was not responsible for inventory tagging and/or validation.
- Requirements for validation and transfer of asset inventories not clearly stipulated in PDC processes or GC/AE requirements.
- Included in handover documents, but not easily consumable by maintenance staff taking on occupancy.
- Loss of momentum with internal staff validation and entry into CMMS.
- **Conclusion: The VALUE of a clean operational handover is not fully understood in our industry.**

# PDC vs. FM

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# Setting The Stage



# Operational Handover Considerations

1. **Operations – WO, PM, Asset Management**
2. **Compliance – ITM, Rounding, Survey Readiness**
3. **Bonus Topic: Energy – Utility Efficiency**
4. Redundancy and Flexibility – Facility/System Adaptation
5. Capital Planning - Total Cost of Ownership
6. Design Standardization – Future Maintenance Requirements
7. Others?

# Operational Handover

## PDC vs. FM

### PDC Considerations

- Basis of Design (BOD)
- Intended life of building
- Occupancy type
- Stakeholders/Collaboration
- Design team interviews
- Contracts/State requirements
- Design/Infection standards
- Decision/Communication matrix

### PLANNING PHASE

Operations

Compliance

Energy/Utilities

### FM Considerations

- High risk/revenue areas
- Asset uptime/redundancy
- Envelope, CEP, roof structure
- MEP, etc. BUDGET!!!!!!
- Risks: DEVA/HVA/PCRA
- MEP/P-tube/elevators/doors
- Energy Star & Commissioning
- Survey Ready Day One?

# Operational Handover

## PDC vs. FM

### PDC Considerations

- Data Handover, Operational Policies, etc.
- Construction approvals vs. Accreditation
- Decision making process
- Scheduling & Budgeting
- Team structure/collaboration
- Total Value Design (TVD)
- Tie-Ins, Quick Connects, Emergency Shut-Offs, etc.
- Temp equipment locations

### DESIGN PHASE

Operations

Compliance

Energy/Utilities

### FM Considerations

- Building/asset Lifecycle costs
- Areas served (impact risk)
- Policy vs. Min code compliant
- Maintenance access
- Sequence of Operations
- Design/Maint./Data standards
- Emergency contingencies
- MEP budget/coordination
- Energy/Monitored points
- Survey Ready Day One?

# Operational Handover

## PDC vs. FM

### PDC Considerations

- **COMMISSIONING**
- **Operational team inclusion in Cx process**
- **Monitoring of change orders vs. design**
- **Internal vs. external MEP engineering resources**
- **Mutual access to spaces and systems**
- **Updates to documentation**

### CONSTRUCTION PHASE

Operations

Compliance

Energy/Utilities

### FM Considerations

- **COMMISSIONING**
- **ICRA/PCRA/ILSM and clean site protocols**
- **Maintenance strategy (training/staffing, etc.)**
- **BIM coordination and data mapping to CMMS**
- **Time lapse photos**
- **Utility tie-ins/hot work**
- **Warranty process**
- **Survey Ready Day One**

# Operational Handover

## PDC vs. FM

### PDC Considerations

- Complete drawing and documentation transfer
- Accurate BIM transfer and maintenance
- Certificate of occupancy vs. accreditation survey
- Sub-Contractor Contact Information
- Warranty documentation
- Survey Ready Day One!

### ACCEPTANCE PHASE

Operations

Compliance

Energy/Utilities

### FM Consideration

- No Commissioning issues
- BIM sign off
- Risk ranked asset inventory
- CMMS online and running
- As-built drawings with room names and numbers
- Survey Ready Day One!
  - CMS/Life Safety Survey
  - Documentation
  - Maintenance plan

## **Poll Question 1: When is the best time to collect asset information?**

- 1. As soon as design is finished (BIM/CAD, etc.)**
- 2. As assets are installed in the facility.**
- 3. 3 months before occupancy and initial accreditation survey.**
- 4. Post occupancy FCA so we know changes are complete.**
- 5. Add them as needed when maintenance techs are in the field.**

## **Poll Question 2: Who is responsible for inventory accuracy?**

- 1. Design (A&E) Firm**
- 2. General Contractor**
- 3. Equipment Installers and/or Sub-Contractors**
- 4. Commissioning Agent**
- 5. The Owner**

# Operational Commissioning



# Discussion: Q&A

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# Contact Information



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# Audience Challenge

**Please review ALL of your current PDC projects and ensure operational needs have been considered and will be provided as a project deliverable.**

**“If you don’t know where you’re going,  
you’ll end up someplace else.”**

~Yogi Berra

# Thank You!

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