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WHITE PAPER

What to Ask Vendors in a Healthcare Facilities Management RFP:

Twenty Essential Questions



The landscape of healthcare has fundamentally changed over the past decade, underlining the value of dedicated facilities management teams and the importance of hospital leadership teams being in sync with their facility managers. As healthcare facilities struggle to adjust to the new normal, the choice of a facilities management partner is critical when addressing the challenges healthcare faces moving forward.

Facilities management vendors have widely varying models and expertise when it comes to staffing, standardization, technology, and the ability to quickly pivot when circumstances change and during emergencies.

To identify the best facilities management partner for your needs, start with a strong and clear request for proposal (RFP). Define your goals and identify the services and service model that best fits your needs, then ask the right questions.

Using the right question set will help you:

- ✔ Understand the range of service options available
- ✔ Compare the experience, expertise, and tools offered by vendors
- ✔ Uncover any risks or potential hazards
- ✔ Identify the best service value for your spend
- ✔ Quickly move to a decision and partner implementation

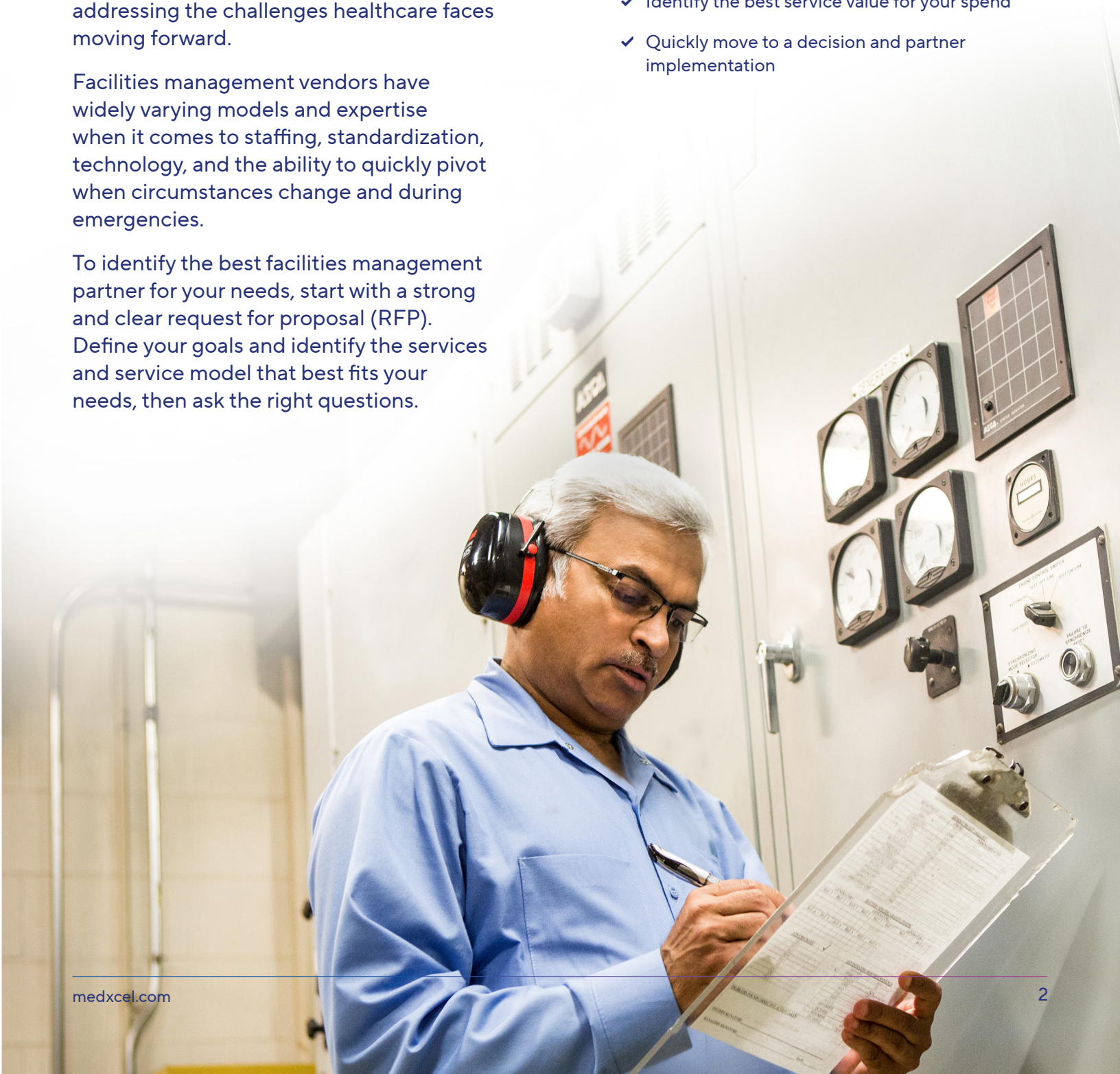


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Communicate goals

Before crafting your RFP, take time to define your facility management goals in a way that can be clearly communicated. These goals will be instrumental in helping to guide your RFP process and decision making. Clear goals will make it easier for vendors to determine whether to respond to your RFP.

Goals to consider might include:

- Implementing standardized processes
- Improving work order response time
- Maintaining on-site expert staff
- Ongoing staff training
- Increased compliance score
- Attaining 24/7 survey readiness
- Proven regulatory compliance program
- Creating a full emergency operations plan
- Improving safety metrics
- Realizing cost savings

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Define scope of services

Facilities management can encompass a wide range of services. Clearly defining the scope of services within your RFP will help match vendors whose services and skills meet your needs and will allow you to draw comparisons more easily from RFP responses. Spend time thinking through your needs in a comprehensive manner to capture all services that would benefit your organization.

Services to consider might include:

- 24/7 full-service facilities management program (general maintenance and repair, plumbing, electrical, HVAC, and power plant)
- On-site management
- Safety
- Environment of care
- Emergency management including disaster response
- Regulatory compliance program
- Round the clock emergency support
- National call center
- Full inventory validation
- CMMS full support
- On-site staffing model vs. outsourced
- Reporting and analytics
- Access to industry leading national benchmark data
- Dedicated supply chain
- Dedicated support services
- Asset management expertise
- Predictable pricing model
- Additional healthcare expertise in areas such as real estate, planning, design, and construction, and energy management



Team organization and key personnel

Question 1

What qualifications and experience do you have in providing facilities management services to a health system?

The healthcare environment is unique when it comes to facilities management, encompassing everything from strict compliance and accreditation needs to the ability to remain operational, providing a safe healing environment 24/7 even when disaster strikes. Vendors should have a wealth of experience in hospital settings, with proven success in leading their clients through surveys, weather related disasters, and outbreaks of infectious disease.

What to look for:

Look for a partner with a strong percentage of clients within the healthcare industry led by a team with extensive healthcare leadership experience. Experience in other industries does not necessarily translate to the unique needs of healthcare. Consider the number of healthcare clients across the country that currently partner with the vendor and review their customer satisfaction survey and net promoter scores.

Question 2

What is your staffing plan, should you be awarded this business?

Staffing models vary greatly, and talent expertise is key to success. On-site vs. outsourced staff will impact response times as well as knowledge of your unique facility. Ask how staff is managed and trained, and how turnover is addressed.

What to look for:

Carefully consider the proposed staffing model in terms of in-house or outsourced, staff training and certification, turnover, and expertise. Ensuring that the facility is properly staffed is crucial to response times, service satisfaction, and overall safety of the healing environment.



Question 3

What professional designations and/or special licensing do individuals in your organization hold?

There are a wide variety of professional designations unique to healthcare facilities management leaders and staff. Vendors should be able to provide information around professional designations, licensing, and certifications of their team members.

What to look for:

Look for these professional designations:

- Certified Healthcare Facility Manager (CHFM)
- Certified Plant Engineer (CPE)
- Certified Energy Manager (CEM)
- Certified Hospital Engineer (CHE)
- Licensed Professional Engineer (PE)
- Certified Life Safety Code Surveyor
- Life Safety Code Specialist
- Certified Healthcare Emergency Professional (CHEP)
- Certified Healthcare Safety Professional (CHSP)
- Certified Healthcare Constructor (CHC)
- OSHA 30 Safety Certification
- LEED Accredited
- Project Management Professional (PMP)
- Lean-Green Belt
- Certified Life Safety Specialist for Healthcare Managers (CLSS-HC)
- Certified Fire Inspector (CFI-I)

Question 4

What measures do you have in place to ensure staff receive the proper training?

Ask vendors about the ongoing training, certification, and continuing education programs they offer staff. Providing paid tuition, continuing education, certification programs, and ongoing safety and equipment training results in better service to clients, as well as an engaged workforce with lower turnover.

What to look for:

Look for vendors that provide robust training and development programs, partnerships with national and local organizations, tuition reimbursement, and robust in-house training programs.

Question 5

What programs are offered for staff to obtain advanced degrees and/or specialty training/ certifications?

Vendors should provide facilities leaders and team members with the means to grow their knowledge base and careers through attainment of degrees, certifications, and specialty training unique to the healthcare industry and/or specific skill sets. Organizations dedicated to growing their talent offer benefits which provide resources and support towards tuition, certification course preparation, exams, and online and live training courses.

What to look for:

Look to partner with an organization that invests in and supports its talent pool in a wide variety of ways. Be sure that your facilities maintenance staff is as highly skilled and up-to-date with ongoing training as possible.

Question 6

What is your organizational structure and regional support model?

When looking at the support provided by a vendor, consider not only the executive leadership team and their experience within the healthcare industry, but also carefully examine the depth of the support teams behind the facilities staff. These teams include project management, regulatory compliance, emergency management, life safety, employee and customer engagement, supply chain, national call center, and technical training teams.

A well-established regional support model will clearly delineate those responsible for the long-term execution, oversight, and continued successful operations of local facility management programs, and provide clear points of client contact.

What to look for:

Examine the teams behind the scenes, providing the support, equipment, supplies, training, reporting, and standardized processes to those serving your facility. What kind of local field operational support will the vendor provide to you on a daily basis?

Question 7

What percentage of your current client portfolio is in healthcare?

Few organizations work exclusively within healthcare, choosing instead to cast a wide net across multiple industries. The requirements of healthcare facilities responsible for patient safety are much more stringent than those of other industries. Carefully consider the past successes of each vendor with regards to patient safety, survey readiness, compliance, emergency management, and the percentage of their portfolio which is in healthcare.

What to look for:

As a healthcare organization, look for a facilities management partner with expertise and a proven record of success within healthcare facilities like yours. Preference should be given to partners that work exclusively with your industry.

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Experience and technical competence

Question 8

How do you successfully manage scope, schedule, and budget?

Vendors should be able to provide transparency into the methodologies employed to manage the facilities program, including proven experience managing a complete facilities program with a predictable operating spend, measurable value delivery, within budget, and on schedule.

What to look for:

Review deliverables including data collection and scope alignment, inventory and compliance assessments, comparative analytics and unbiased benchmark data, national vendor agreements and support functions, and budget review and approval processes.

Question 9

How do you respond to emergency calls for service?

Hospitals are operational 24/7 and your facility management service needs to have systems in place to respond quickly to emergency calls at any time. A call center supported by on-call management and staff during non-peak hours should be able to provide 24/7 coverage in an emergency.

What to look for:

Be sure to have a thorough understanding of the work order process and how it is supported, via online technology, and a call center. Ask specific questions around how work orders are triaged and prioritized, and the process for peak and non-peak hours emergencies. Average response times to emergencies should be available for your review.

Question 10

What measures do you have in place to ensure professional conduct and quality workmanship?

Facilities staff are client-facing and should exhibit the highest levels of professional conduct and courtesy to your staff and patients, while delivering the highest levels of workmanship in all areas of service. Vendors should have methods in place to measure work quality and speed of responsiveness to work orders and be receptive to client feedback.

What to look for:

Look for a vendor who offers a standardized program which drives efficiencies to clients. Customer satisfaction survey data will provide insight into the professionalism and quality of the facilities workforce at current client sites.

> “Look for a vendor who offers a standardized program which drives efficiencies to clients.

Question 11

How do you ensure compliance with Authorities Having Jurisdiction (AHJ) and other safety regulations as required by various disciplines?

Increased focus by The Joint Commission and other AHJs on the Physical Environment, including the environment of care, life safety, and emergency management has created a sense of urgency for improved documentation in these areas. A facilities management vendor should provide proven expertise in the area of compliance, backed by a national team with proven results.

What to look for:

Look for a vendor with a standardized compliance program including a documentation system, backed by a proven national compliance team. A track record of success in improved survey findings and compliance levels is key when selecting a vendor. Ask about the vendor process measuring survey readiness pre- and post-startup as well as continuous program validation methods.

Question 12

What type of technology do you use for tracking work and reporting?

A full-service computerized maintenance management system (CMMS) is designed to track corrective and preventive actions needed to sustain a high performing facility and extend the life of capital assets. Vendors should provide a CMMS for ease of work order entry, completion, and with reporting capabilities. Successful vendors also provide live support in addition to the technology, allowing your staff access to a call center providing immediate assistance with low call wait times.

What to look for:

Look for a robust CMMS system and staff who are equipped with the latest technology such as a mobile device loaded with the CMMS application, allowing them to manage corrective and preventive work orders on the go in your facility, reducing delays. The system should provide an easy method for your staff to submit work orders, allowing them more time to serve patients.



Question 13

How do you communicate with hospital leadership?

Communication between the facilities vendor and clients is critically important. An established cadence between leaders of both organizations provides for a scheduled communication touchpoint to review KPIs, identify areas for improvement, and for the vendor to receive customer feedback that can be acted upon.

What to look for:

Look for a vendor that provides monthly report outs on their work including agreed upon KPIs, ensuring transparency and a way to address any concerns immediately. Regular touch points with client leadership are beneficial in building a partnership based on two-way communication, allow for ongoing adjustments to the program, and ensure constant alignment between the goals of the facilities vendor and client.

> “Look for a vendor that provides monthly report outs on their work including agreed upon KPIs, ensuring transparency and a way to address any concerns immediately.



Question 14

How will KPIs be tracked and reported?

Look for a vendor with an established communication cadence covering standardized reports and agreed-upon KPIs as well as key business initiatives. Regular touch points not only allow the vendor to report out on successes and challenges, but allow a regularly scheduled forum for two-way conversation, allowing for client feedback to be received and acted upon.

What to look for:

Here are four key areas and measurements to consider when establishing KPIs:

Customer experience

- End-to-end service request experience (the cycle from service request being placed to completed)
- Work order metrics measuring response time as well as quality of work

Service request data

- Service requests entered online vs. via call center
- Work order call center metrics

Operational data

- Corrective work order average turnaround and response time, broken down by priority status
- Percentage of corrective work orders vs. preventive maintenance work orders completed

Safety and regulatory

- Safety and environment of care facilities findings
- Regulatory metrics

Question 15

How do you approach capital planning and prioritization?

A facilities management vendor should be a strategic partner when it comes to capital planning and prioritization beginning with a facility walk through where all capital equipment is identified and assessed for condition and life expectancy. The vendor should then develop a five-year roadmap for capital planning based on the information and the life expectancy of mechanical, electrical, and plumbing infrastructure.

What to look for:

Look for a vendor with proven capital planning and a plan to inventory and assess the long-range life of capital equipment including items such as boilers, chillers, generators, and other major equipment in your facility.

> “A facilities management vendor should be a strategic partner to capital planning.

Question 16

How do you measure client satisfaction and adjust services based on feedback?

Data is key in healthcare and client satisfaction should be no different. Vendors should take a multipronged approach to measuring client satisfaction and receiving feedback. An annual voice of the client (VOC) survey measuring the overall health of the partnership and an ongoing transactional survey measuring service delivery satisfaction should be part of a vendor's program.

This provides opportunities for the vendor to receive feedback directly and adjust service delivery accordingly. Metrics such as net promoter score (NPS) and Overall Satisfaction should be defined to measure service delivery and establish plans to make performance adjustments.

What to look for:

Ask what process is in place to measure service delivery in terms of work order satisfaction on an ongoing basis. Vendors should have a program in place that enables clients to provide feedback regarding their service experience on a regular cadence. Learn the specifics of each vendor's customer satisfaction performance metrics and how they utilize survey data to make improvements. Review performance metrics such as NPS or Overall Satisfaction for each vendor under consideration to understand the experience of their current clients.

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Schedule of fees

Question 17

What is the fee structure of your facilities management program?

Vendors should provide a pricing structure based specifically on the scope and size of your facility or organization. Consideration should be given to current spend including service contracts and should include conversations with key department leaders within your facility, and existing facilities management workforce to provide a holistic view of your current facilities management program. All program services and associated costs should be agreed upon prior to implementation.

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What to look for:

The vendor pricing process should involve an in-depth collaborative effort designed to identify your critical issues, verify your current spend, and clearly identify potential areas to reduce or contain costs and optimize service while enhancing the overall healing environment. Without a clearly defined assessment process, the pricing provided may come with unexpected surprises once implementation begins.



Implementation and onboarding

Question 18

How does your organization handle facilities management program implementation?

Successful vendors have a proven, standardized program for implementation and onboarding that allows for minimal disruption to the client. A successful implementation plan creates a seamless transition, is supported by a robust communication plan, and is designed to address and relieve the working anxiety of those involved. Vendors should compile a precise list of your facility assets for accurate monitoring, capital planning purposes, and to ensure regulatory compliance and survey readiness. The vendor should be prepared to deliver dedicated expertise from day one of the program.

What to look for:

An implementation plan should include a kickoff with executive leadership from your site(s) and the facilities vendor, a thorough operations tour and compliance assessment by the vendor's team, and an on-site survey and inventory of all mechanical, and life-safety assets, rooms, and corridors. This tour will provide the data to populate the vendor's CMMS system and will also support regulatory requirements.

Question 19

What is the duration (length of time) for implementation and onboarding?

Vendors should be able to clearly delineate the required time for completely onboarding your facility(ies), backed up by experience in facilities of similar size and scope.

What to look for:

Vendors should have a smooth onboarding process, clearly laid out in phases with a specific timeline.

Question 20

What should a healthcare system expect to see in the first year of operation of your facilities management program?

Most clients of a best-in-class facilities management vendor can typically expect to see improvements within the facility in the first year. A vendor can accomplish this through the implementation of standardized processes, such as a compliance documentation system and a robust CMMS system, supported by experts in each area. Establishing an in-house program will provide a means to reduce the cost of current service contracts as they expire.

What to look for:

Vendors should be able to provide expectations for first year performance based on experience with their current portfolio of healthcare clients. If a vendor has an established KPI reporting structure in place, the ease of tracking improvements is already established. Regular review of agreed upon KPIs will provide feedback from the beginning of the program. A vendor with best-in-class unbiased benchmark data will be able to provide comparisons with other health systems.

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