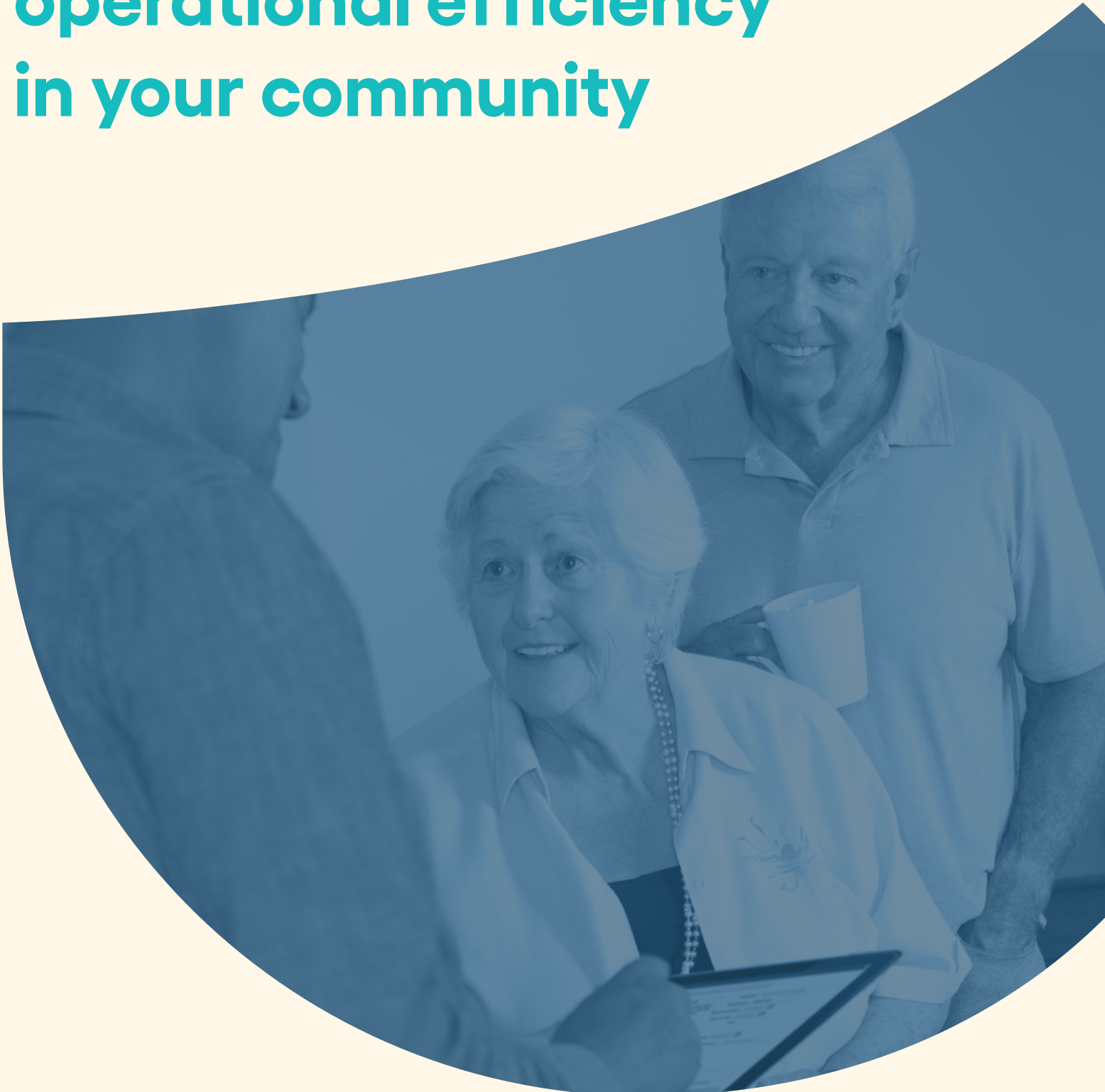




4 ways to maximize operational efficiency in your community



Lower occupancy, growing expenses, increasing workloads and demands.

It's a common story in today's world of senior living communities.

With this being the case, it's become an industry-wide challenge to find the time and tools to measure efficiency and find easy ways to increase it. But, with the lack of money and resources, now is the time to start establishing more efficient processes to increase staff collaboration and resident satisfaction.

Since you're always expected to be evolving (with new processes like staff health checks and infection control procedures, as well as building upgrades and technology), the operations team is the perfect group to embrace this time of change as an opportunity to improve.

You can start by benchmarking and looking at important KPIs (or key performance indicators), seeing how other communities operate smarter and picking the easiest areas for you to improve with the greatest impact on time and dollars.

From our research, we've found that the journey to maximizing efficiency in your community starts with improving operations in four areas:

- Asset management
- Staff & productivity
- Decision-making
- Energy use

See ways you can simplify in each of these areas and cut down on budgets and expenses, while balancing the workload with the workforce you have today.

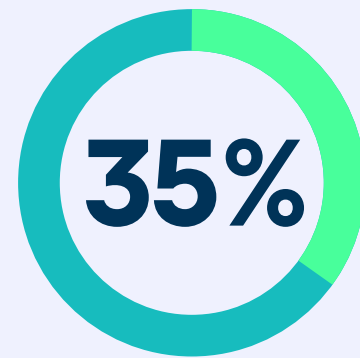


CHECKLIST

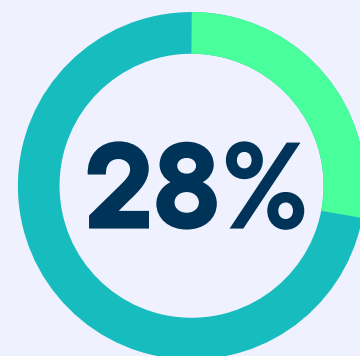
Complete our efficiency checklist to see how efficient you are

[Learn more](#)

Leading organizations that have focused on these areas experience:¹



extended asset and equipment life



increase in maintenance productivity

1 | Asset management

CHALLENGE

With the need to focus on the immediate requirements of staff, residents and regulatory bodies, senior living operators of all sizes can miss out on a huge opportunity for savings when it comes to the millions of dollars tied up in the physical assets (equipment and building components) of the community.

Priorities:

- Deciding whether to spend money repairing something again vs. replacing it
- Investing in preventive maintenance (PM) to extend asset life
- Monitoring warranties so you don't pay for covered repairs
- Ensuring dollars are set aside for long-term capital planning

OPPORTUNITY

Although the challenge of truly managing assets may sound daunting, the reality is there's an incredible opportunity for operators of all sizes by taking advantage of some simple tweaks to process and getting the right tools in place to manage the information.

Imagine being in a place where asset life spans are extended (and the dollars required to replace assets are pushed off into future years), there are no surprise capital expenses sending you scrambling for funds, and you make the right decisions when it comes to repairing or replacing assets. All of this is possible.

It all starts with a system of record – your **CMMS (computerized maintenance management system)**. The right solution keeps a digital and easily accessible record of each of your assets, along with their work history, cost of repairs, reminders for PM, manuals – basically everything needed to deliver on asset management.

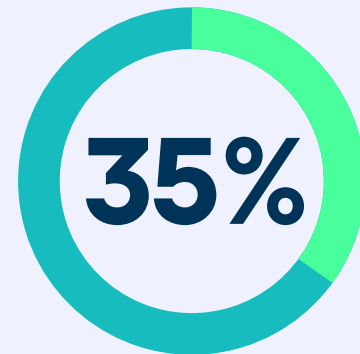
A great system should be easy to use, specific to senior living and should, at a minimum address these key areas.

Areas of opportunity:

PREVENTIVE MAINTENANCE

- PM is essential to both getting the longest life possible out of your assets and ensuring compliance with regulatory requirements. Here you'll want to make sure you have a system with reminders, step-by-step instructions (making sure if you have staff turnover, all the information on how to do work doesn't walk out the door), a full history of what's been done, and a system that is super easy to use.

With a CMMS, you can experience these benefits:¹



Regular preventive maintenance can extend the life of your machines by as much 35%



35-50%

improvement in the reliability of your equipment

TRACKING ASSET & REPAIR INFORMATION

→ When asset information is only stored in the minds of your maintenance team, decisions are often made by guessing and opportunities are missed. Add assets to your CMMS, including warranty information, locations, work history, purchase price and even photos, and your team will be able to work faster and you'll be able to make better decisions and save money on asset repair vs. replacements.



Technicians can access the information they want a lot faster than they have ever been able to in the past. It has made my existing staff more efficient. We can do a report and understand where we're at on the lifecycle and start planning for some of our capital assets.



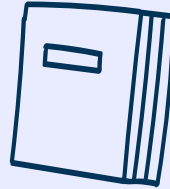
Casey Jones
Presbyterian Senior Living

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CAPITAL PLANNING

→ We've found that very few senior living organizations have capital plans that go beyond the short-term horizon (2-3 years) — and that those that do often only look out 4-5 years. This presents a real challenge when you consider the average lifespan of more expensive assets (10 to 20 years for major components like HVAC, roofing, fire safety systems, etc.) Leading organizations take a proactive role in a creating 20-year capital plans that include asset condition, current replacement cost, estimated

remaining life and repair history. Using this data and a great CMMS tool, they can easily create 20-year capital plans that are indexed to inflation, ensuring they have enough dollars set aside to cover major repairs.



GUIDE

Get additional tips in our
Guide to Capital Planning &
Expense Control

[Learn more](#)

2 | Staff & productivity

CHALLENGE

Daily, you're being asked to do more with less. With your staff, that translates to fewer full-time staff members, retiring staff positions that are hard to fill, and less time and resources for training. That's why it's an important time to ensure you're staffing efficiently and providing tools to maximize productivity.

Priorities:

- Documenting work details, time and notes in one system
- Giving technicians a prioritized list of daily work
- Investing in mobile software to save time doing and recording work

OPPORTUNITY

Efficiency is certainly a resource that we could all use more of – especially when staff resources are in flux. Finding ways to save time and stretch staff resources starts with properly tracking time and organizing workflow.

Areas of opportunity:

MOBILE

- Mobile technology is another important tool that allows technicians to use their time more wisely and communicate faster. Easy-to-use technology empowers staff to track their work time, attach time to assets and projects, and receive and complete work all on their mobile device (without having to go back to the office or shop to get assignments). Some systems even have timers you can start and stop on a mobile device while working on a specific task.

Your changing workforce



of facilities personnel are set to retire in the next 10 years²

“

My staff has gotten more efficient since we started using timers. I can clearly tell the staff is getting more work orders done per day than prior to having mobile.

”

Brandon Fowler
Canterbury Court

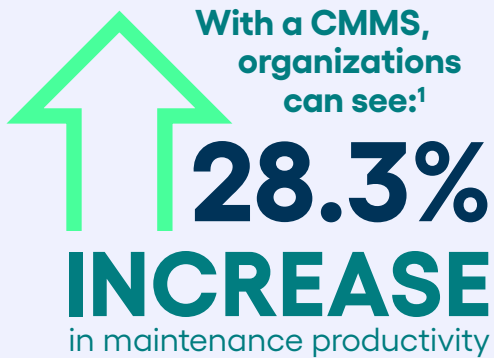
[Learn More](#)

CHECKLIST

See how you can take your maintenance to the next level with mobile

[Learn more](#)





AUTOMATING WORKFLOW

→ Your workflow will define how quickly or slowly, efficiently or inefficiently maintenance and operations work can get done. You need technology that your team uses as a tool to automate that process with ways to automatically assign work orders to the right tech, trigger requests for maintenance needs across departments (from housekeeping to events) and a system for organizing who should be doing what work, when.

“

We have a central location where all orders are placed electronically, and it is immediately sent out to the team. This is a great time savings.

”

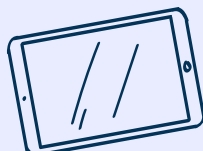
Cory Noble
Riverview Retirement

[Learn More](#)

WEBINAR

Get more data in our House-keeping Benchmarks webinar

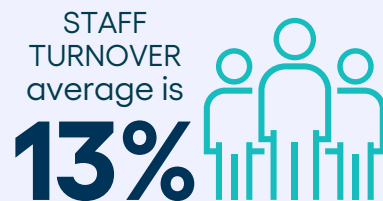
[Learn more](#)



HOUSEKEEPING IMPROVEMENTS

→ Some suggestions to improve your housekeeping data points are to gauge the effectiveness of set assignments vs. rotating assignments for housekeeping staff and improving your QA (quality assurance) program.

From a survey of 100 housekeeping clients, we discovered:



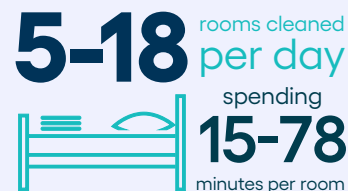
Staff per unit ranges from

3-6 staff members PER 100 resident units

- 4 to 6.2 for CCRCs
- 4 for independent living communities
- 3 for assisted living communities



do some sort of a deep clean semi-annually or annually (usually 2.5-4 hours)



3 | Decision-making

CHALLENGE

From repairing vs. replacing assets to organizing compliance tasks to staff training, you have a number of critically important decisions to make every day – and those often come spontaneously and require quick answers. So, how do you stay prepared to make the best decisions that prioritize safety and compliance while also stretching your efficiency and budget?

Priorities:

- Customizable and automated reporting tools to help you make decisions on workflow, staffing, contractors, assets, etc.
- Accessible data that you can configure to your needs
- A way to organize resident billings and link work back to budgets

OPPORTUNITY

There is a better way to make your data count as you make decisions about today and the future – as well as share your findings with other decision-makers and leaders in your organization. **Data helps you prove the efficiencies you have today and what you need to improve in specific areas.**

BALANCING SERVICE LEVELS WITH STAFFING LEVELS

- To be able to effectively staff your organization, you need data to turn to that can help. Determine what your desired service level agreements (SLAs) are across departments and let that inform the staff numbers you need in each area. You can also look at data on productivity to see where you're using your staff efficiently or not.

SHARING DATA WITH STAKEHOLDERS

- Having work hours and other data at your fingertips means you can create reporting that is data-rich and

easy to compile. Reporting can help you prove your resource needs and keep decision-makers informed about your successes and challenges.

DECIDING ON STAFF VS. CONTRACTORS

- How do you decide whether to use your staff or contractors for a specific job, project or area of maintenance and operations? When you're just making an educated guess, it can end up costing you in time and/or money. When you have the data to see what is most efficient, then it's a win-win for your organization and your staff.
- For better decision-making on staff vs. contractors, use key performance indicators around:
 - Volume of work
 - Billings per resident unit
 - Percentage of work completed on time
 - Average days overdue

Look at your numbers around those areas to decide what is the most cost-effective approach to your workload, without burning out your full-time staff or leaving them looking for work to do. If you are using contractors and you're a part of a multi-site organization, stretch their time by sharing them across campuses and locations.

We help senior living organizations
PROCESS OVER
\$55
MILLION
in fee-for-service chargebacks

The infographic features a central graphic with the text "\$55 MILLION" in large, bold, dark blue font. Above it, in smaller teal font, is "We help senior living organizations". Below it, in teal font, is "in fee-for-service chargebacks". The words "PROCESS OVER" are in bold black font above the "\$55". Two large, curved teal arrows form a circle around the central text, pointing from the bottom right towards the top left.

IMPORTANT KPIS LINKED TO EFFICIENCY

You can't make the best decisions if you don't have data. But data on its own doesn't hold much weight. You need a way to compare and benchmark your data to make impactful decisions to impact your efficiency.

After analyzing data from 500+ senior living organizations, we came up with these KPIs to help you see where you fit with your peers and how you can improve:

WHAT IS YOUR LABOR TIME PER RESIDENT UNIT?

Industry Average: 14 hours annually per resident unit

If yours is higher:

- Do you have a lack of PM work?
- Do you have systemic building issues or a large amount of non-resident spaces to maintain?
- Do you have a high volume of resident service requests?

If yours is lower:

- Do you have a newer building?
- Do you have an intensive PM program?
- Are you missing data or have you not been tracking time?

To be more efficient in this area:

- ⊕ Set clear expectations with work time
 - If it takes more than five minutes, track the work order
 - Create a time logging guide
- ⊕ Educate and train your staff
 - If it's not logged, they shouldn't do it
- ⊕ Keep score anonymously or use staff numbers to encourage healthy competition and improvement

WHAT IS THE AVERAGE TIME SPENT PER WORK ORDER?

Industry Average: 1 hour and 10 minutes per work order

If your time spent is higher:

- Do you have a large campus with higher travel times?
- Do you take on complex jobs internally?
- Are staff batching work orders together on a single ticket?

If your time spent is lower:

- Do you have a small campus/single building?
- Are you contracting out complex jobs or splitting out longer jobs like painting or refurbishments to another department?
- Are staff members logging their time properly?

To be more efficient in this area:

- ⊕ Use this KPI to review the efficiency of your staff and see if you can improve in this area
- ⊕ If you have times above the average, you should look deeper into the cause
- ⊕ Factor in productive hours per employee

HOW MANY DAYS DOES A WORK ORDER STAY OPEN ON AVERAGE?

Industry Average: 3.8 days

If your volume of work/time is higher:

- What is causing the delay?
- Are there parts on order?
- Is it the case that residents are not giving permission to enter if they're not home?
- Is it influenced by contractor work time?

If your volume of work/time is lower:

- Are you reacting too fast or not batching jobs together?

To be more efficient in this area:

- + Two days is typically the maximum wait time without a response before issues arise
- + Setting specific expectations for staff and residents is key to success

“

I was able to provide that data and show him exactly the months we had spikes. It was one meeting, a 30-minute conversation and he gave me approval to hire someone else. If I hadn't been able to compile that data, it wouldn't have happened.

”

Brandon Fowler
Canterbury Cour

[Learn More](#)



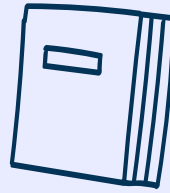
4 | Energy use

For many organizations, energy and utility use is a top budget line item – and the surprising fact is that it's not necessarily a fixed expense.

With new processes, an established energy management program and a joint effort to save energy, you can start to shave numbers off your energy expenses.

USE OUR 5 CS OF ENERGY CONSERVATION TO GUIDE YOUR PATH TO ENERGY EFFICIENCY:

1. **Clarity** - Get full visibility into your bills, meters and usage. You can't make priorities until you know where you stand, so this stage is critical.
2. **Cost avoidance** - Find billing errors and identify areas of cost savings. See if there is any area where you're paying too much, and then find places where you can easily start saving.
3. **Conservation** - Discover ways to reduce your energy consumption, whether it's by finding grants or programs that apply to your community or empowering energy stewards within your organization to spread the word about efficiency.
4. **Compliance** - Ensure you have the right data and reports for regulatory compliance and inspections, including documentation about any energy efficiency programs and conservation efforts you've implemented.
5. **Communication** - Gain buy-in and get your entire organization involved by spreading ways they can save energy, from minimizing electricity to installing low-flow shower heads. It's a team effort to become more energy efficient, and ultimately everyone wins.



GUIDE

Get additional tips in our Guide to Capital Planning & Expense Control

[Learn more](#)

ENERGY SAVERS FOR SENIOR LIVING COMMUNITIES

Additional ways that senior living communities are saving energy include:

- Smart building systems and using technology to automate them
- The opportunity to retrofit assets to be more efficient
- Updating to LED lighting to save
- Replacing large assets like old boilers that waste energy



Energy management can help you save

20%
ON UTILITY
COSTS

TECHNOLOGY AS THE TURNING POINT TO MAXIMIZING EFFICIENCY

Being efficient is all about using your resources to the max, even if that means you don't have enough of those resources. Since many communities are in this type of situation, now is the right time to start tightening processes and working smarter, not harder.

Technology has a great part to play in this transition. With an operations management solution like TheWorxHub™, you have the data to see where you're already operating efficiently, as well as the low-hanging fruit of where you can easily save.

- Use your maintenance data to find areas of your operations with the biggest gaps (ex. Where do you have the most work orders or what are your high frequency areas?)
- Pick places where you can have a significant impact to achieve considerable savings of time and resources
- Report and share your success with your team, department and organization

So, where will you start today in your community?



SOURCES

- 1 "8 ROI Stats on the Benefits of a CMMS," Brightly. <https://www.dudesolutions.com/resources/8-roi-stats-benefits-cmms>
- 2 "Navigating the Changing Workforce," Brightly. <https://www.dudesolutions.com/resources/navigating-changing-workforce-guide>

About Brightly software

Brightly, the global leader in intelligent asset management solutions, enables organizations to transform the performance of their assets. Brightly's sophisticated cloud-based platform leverages more than 20 years of data to deliver predictive insights that help users through the key phases of the entire asset lifecycle. More than 12,000 clients of every size worldwide depend on Brightly's complete suite of intuitive software – including CMMS, EAM, Strategic Asset Management, IoT Remote Monitoring, Sustainability and Community Engagement. Paired with award-winning training, support and consulting services, Brightly helps light the way to a bright future with smarter assets and sustainable communities. For more information, visit brightlysoftware.com

