



SENIOR LIVING EFFICIENCY CHECKLIST

Efficiency isn't something you achieve overnight, but with the right systems and processes in place, you can make a real difference for your community.



So, how efficient are you?

Do you have... *(check each box that applies)*

EQUIPMENT & ASSETS

- A list of your assets
- A way to track the repairs and costs of those assets
- An automated reminder system for your preventive maintenance (PM) tasks
- Detailed instructions and procedures for staff to use when completing a PM task
- A way to make asset repair or replacement decisions based on data
- Reminders for asset warranties that are soon to expire

STAFF/ PRODUCTIVITY

- A prioritization standard for tasks with expected response times
- Reports on staff productivity, such as # of productive hours per week
- A way for staff to pick up work orders on a mobile device vs. coming back to a central office for assignments
- A way to track multi-task projects (such as renovations)

BUDGET/ WORK HOURS

- A system to track where and how work hours are spent
- A way to justify staffing levels if required when facing budget challenges
- A documented 25-year capital plan
- Reporting on how much you've spent on renovations vs. standard maintenance
- A way to help answer your CFO's questions about when an asset should be replaced and why

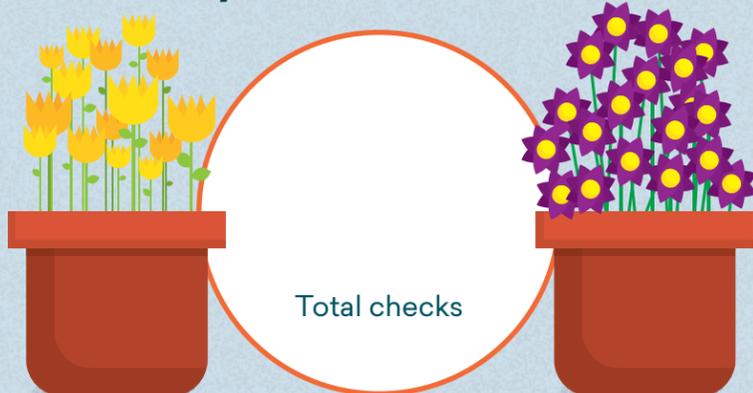
ENERGY

- A system to track utility use and spending over time
- A smart building system
- A way to track and quantify energy conservation measures

CONTRACTORS

- Reporting to see what is more cost efficient: full-time staff vs. contractors
- A way to track contractor work and costs tied to specific work orders, assets and projects
- Reminders for when a contract will expire, especially for auto-renewing contracts with escalations
- Reminders for when a COI (Certificate of Insurance) expires
- PM reminders set up for tasks even if they are outsourced

How did you do?



0-7 CHECKS: You're an efficiency newbie! We can't wait to see all of the progress you can make within your community to do things quicker and easier with the help of technology.

8-15 CHECKS: You're on the path to improved efficiency! You're just getting started with your journey to efficiency enlightenment, and we would love to help you on your way with user-friendly software tools.

16-23 CHECKS: You're an efficiency master! Keep doing what you're doing and finding new ways to innovate for time and resource savings.



Get our **Guide to Maximizing Efficiency in Your Community** for practical ways to improve your efficiency score.

