



**AGENDA  
STRATEGIC PLANNING COMMITTEE**

**Wednesday, October 16, 2019 at 5:00 P.M.  
Community Room, 138 S. Brandon Rd., Fallbrook CA 92028**

Committee Members: Howard Salmon, Chair and Jennifer Jeffries, Co-chair

Executive Director: Rachel Mason

Staff Members: Linda Bannerman, Pam Knox and Mireya Banuelos

1. Call to Order/Roll Call
2. Public Comments
3. Discussion Items
  - a. Review Wellness Center Consultants Proposals
  - b. Update on Lyft Pilot Program
4. Adjournment

I certify that on October 15, 2019, I posted a copy of the foregoing agenda near the regular meeting place of the Board of Directors of Fallbrook Regional Health District, said time being at least 24 hours in advance of the meeting. The American with Disabilities Act provides that no qualified individual with a disability shall be excluded from participation in or denied the benefits of District business. If you need assistance to participate in this meeting, please contact the District office 24 hours prior to the meeting at 760-731-9187.

A handwritten signature in blue ink that reads "Linda Bannerman".

Board Secretary/Clerk



# PROPOSAL TO DEVELOP A COMMUNITY HEALTH & WELLNESS CENTER FOR FALLBROOK REGIONAL HEALTH DISTRICT

OCTOBER 2019





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www.bdo.com

100 Park Avenue  
New York, NY 10017

October 08, 2019

Rachel Mason  
Executive Director, M.S., M.A.  
Fallbrook Regional Health District  
138 S Brandon Road  
Fallbrook, CA 92028

Dear Rachel,

**BDO USA, LLP (“BDO”)** is pleased to be given the opportunity to support **Fallbrook Regional Health District (“FRHD”)** in developing a community health and wellness center to serve its nearly 60,000 residents. BDO is uniquely qualified to design a health and wellness center that promotes the current and future needs of FRHD’s intergenerational and vibrant community, with a special focus on preventative health and wellbeing.

As your advisor, BDO will provide you with a skilled team of healthcare professionals who are equipped with the hands on expertise in planning healthcare programs throughout the country, serving diverse populations addressing both medical needs and social determinants of health. We have the specific experience of bringing medical professionals and community resources together to meet population health needs.

Our team strives to help our clients design successful health and wellness programs through an interdisciplinary and collaborative approach. Through our experience, we are able to help organizations anticipate change and overcome the many hurdles associated with preventative health care programs in a time of unprecedented policy and demographic changes.

**What else can you expect from BDO?:**

**National & West Coast Presence.** BDO is a professional services firm providing assurance, tax, financial advisory, and consulting services to a wide range of publicly traded corporations and privately held companies, as well as governmental and nonprofit entities. The firm serves clients through 63 offices nationwide. BDO serves nearly 500 publicly traded audit clients and well over 3,000 nonprofits.

**Understanding of Key Issues.** The BDO team has an excellent understanding of how the new landscape of the healthcare industry is unfolding on a national scale while also understanding the issues unique to Southern California. Finally, we understand the implications of changing payment models, new private equity entrants in the healthcare space, changes in reimbursement, new compliance pressures on providers, the entrée of digital health monitoring technologies, and the new opportunities and challenges that all will present.

**Service Excellence & Collaborative Partnership** Your engagement partner, Karen Meador, MD, MBA and the entire engagement team working with her are highly experienced in the healthcare industry and specifically in holistic community health and wellness programs. You can expect clear, timely, focused communications and personal attention from our specialists.

The following proposed statement of work outlines our understanding of all the areas of specific interest to you and further addresses how BDO will meet your service needs. Thank you for the opportunity to propose on this important engagement. We look forward to working with you.

Sincerely,

**Karen Meador, MD, MBA**  
Senior Physician Executive and  
Managing Director, Healthcare Advisory  
kmeador@bdo.com/ 214-259-1477

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**FALLBROOK REGIONAL HEALTH  
DISTRICT REQUEST FOR  
QUALIFICATIONS (RFQ) STRATEGIC  
CONSULTING SERVICES**

Issue Date: October 08, 2019

Proposal Due Date: October 09, 2019 by 5pm

Proposals Directed To: Fallbrook Regional Health

District

Proposal Contacts: Rachel Mason, Executive Director

Number of Proposal Copies: 3

In compliance with this Request for Qualifications and to all conditions imposed herein, the undersigned offers and agrees to furnish the services in accordance with the attached signed proposal or as mutually agreed upon by subsequent negotiation. By signature hereto, the proponent certifies that all representations and certifications contained in its proposal are complete and accurate as required.

Name and Address of Firm:

Name: Karen Meador, MD, MBA

Signature: *Karen Es Meador*

Title: Senior Physician Executive and Managing Director, Healthcare Advisory

Date: October 08, 2019

Phone #: 214-259-1477

Federal Emp. ID# 13-5381590

Fax #: 212-697-1299

Address: 100 Park Avenue

City/State/ZIP: New York, NY 10017





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## WHAT WE HEARD YOU SAY

# BDO Is the Right Firm for FRHD



### A network you know can deliver

- ▶ BDO has more than 100 years of experience delivering assurance, tax, and advisory services to organizations similar to FRHD.
- ▶ We know non-profits, community organizations, and health districts. We know how these entities operate, and are poised to address FRHD's immediate and long-term service needs.
- ▶ Strong West Coast presence, specifically in Southern California.



### Proven health care industry experience

- ▶ Members of our national health care industry practice bring to our clients the broad-based experience, in-depth knowledge, and business savvy that can be critical to your success.
- ▶ Our professionals are well versed in issues facing the healthcare industry.



### Innovative services

- ▶ Flexible approach and methodology to manage the engagement efficiently.
- ▶ Ideas for business improvements throughout the engagement.



### A dedicated and accessible team

- ▶ High level of partner and director involvement.
- ▶ Dedicated project management support to ensure deadlines are met and any potential issues are highlighted early on.



### Value for fees

- ▶ Openness and transparency in pricing our work, no surprises.



## Proposed Approach

**BDO**<sup>®</sup>



# Project Scope

## PROJECT SCOPE

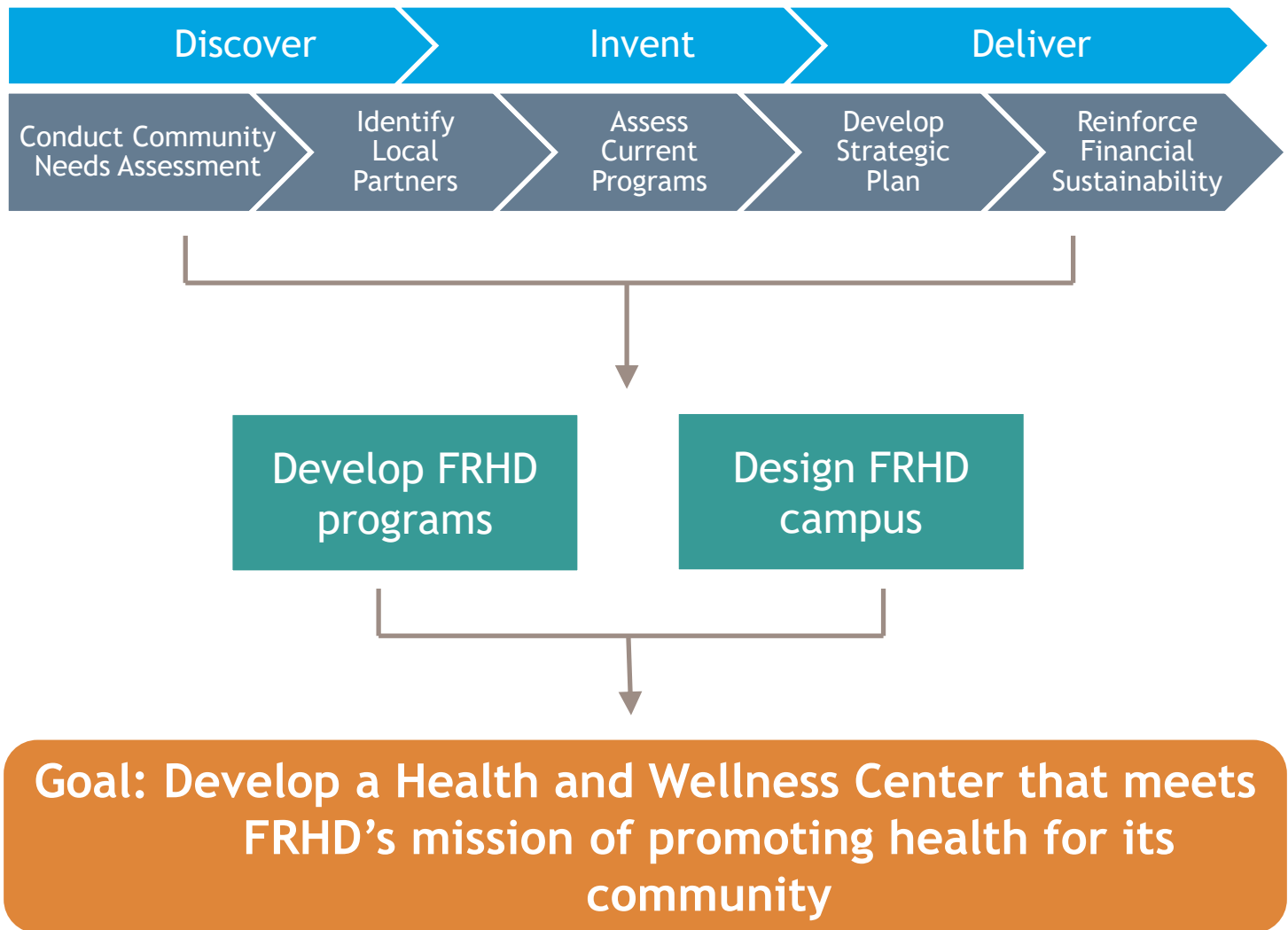
Based on the information provided in the Request for Introductory Proposal (RFIP), and as we discussed during our introductory meeting with Fallbrook Regional Health District (FRHD) senior management on August 29, 2019, it is our understanding that the overall project scope is to assist FRHD leadership to:

- ▶ Develop FRHD’s strategic direction about current and future programs, services, partnerships and innovations that optimize the campus’ potential and aligns with community needs
- ▶ Complete comprehensive market analysis of the local and surrounding Fallbrook Regional communities to provide a data-driven, market assessment of current and emerging trends where FRHD has an opportunity to provide, or create partnerships to provide, innovative preventive health programs and services.
- ▶ Conduct comprehensive review and assessment of FRHD’s “present state” to include (at minimum) programs, services, and grants/community health contract performance metrics.
- ▶ Review current programs and services relative to market study and identify where FRHD supported programs and services add value to the overall continuum of care (preventative or sick care) with respect to service value. Identify future opportunities based upon emerging technologies and evolution of preventative health over the next 25 years.
- ▶ Assess FRHD’s operations and organizational structure, finances, facilities, and technology.
- ▶ Complete gap analysis to identify structure, resources, and skills needed to meet identified opportunities and innovations. Analysis needs to address FRHD program and service delivery within the context of the three pillars which, which serve as FRHD’s guiding principles for a Healthy Living Campus (Health, Livability, and Community).
- ▶ Provide model and roadmap for how FRHD can position itself to meet current and future opportunities (timeline, estimated costs, skills, organizational structure, etc.)
- ▶ Provide matrix of fundraising options and considerations (e.g. capital campaign, corporate/foundation giving, philanthropy, state and federal grants).

# Our Proposed Scope of Work

## BDO's Understanding of the Matter

Based on our preliminary discussions and information outlined in the RFIP, it is our understanding that the overall project scope is to assist in the development of a strategic plan to develop a health and wellness center informed by the current and future health needs of FRHD's intergenerational and diverse community.







# Project Approach

## PROJECT PLANNING & KICKOFF

In order to complete the above scope of work in such a short time frame, below is our suggested approach.

We will begin the project by convening an on-site project kick-off and priority planning session with the senior management at FRHD.

**During this meeting we will work closely with you to further define and agree on:**

- ▶ Key project objectives, desired outcomes, and deliverables;
- ▶ Designated client project team members;
- ▶ Additional Key FRHD staff to participate on project team:
- ▶ Follow- on interviews with selected FRHD board members, key staff, and other decision-makers;
- ▶ Key project dates and timeline, including scheduling of project status calls, on- site interviews, project team meetings, etc.;
- ▶ Key community-based partners and agencies, referral sources, and other stakeholders to interview and involve on the project; and

▶ Data needs; examples include:

- Potential new healthcare programs covered by CMS, MediCal, and other payers/ funding sources,
- Unmet programming needs of nearby hospitals, health systems, and other providers and organizations (with a focus on senior needs).
- Models/best practices of existing cutting-edge health and wellness community centers; and
- Innovative technology/mobile health (MHealth) applications for seniors
- Other areas (to be determined)

In advance of the kick-off meeting, we will request and review any existing data and reports related to the community serviced by this campus.

**This will include, but not be limited to:**

- ▶ Statistics/performance metrics on FRHD's existing social programs;
- ▶ Local demographics,
- ▶ Market analyses
- ▶ Community health needs assessments and surveys

See Pages 10-12 for more details on the project scope and timeline.



# Proposed Strategy

Based on our understanding of FRHD’s goals and the scope of guidance provided by FRHD, we have outlined a strategic plan that begins with a community needs assessment and an assessment of local data. We are ready to immediately begin work and estimate a timeframe of approximately 9 weeks until project completion.

## Ongoing

- Status updates
- Communication with management

## Gathering Information

- ▶ Develop a data request list and review foundational documentation
- ▶ Conduct a community needs assessment to determine specific requirements of wellness center
- ▶ Transmit web-based surveys to collect input from the community and key stakeholders for the anticipated use of the center
- ▶ Hold a strategic planning session with FRHD board and community stakeholders to finalize service costs, project costs, and financing

## Analysing Data

- ▶ Complete a Strengths, Weaknesses, Opportunities and Threats (SWOT) Analysis based on survey findings
- ▶ Conduct cost-benefit analysis to assess feasibility of proposed services and their impact on community health goals
- ▶ Identify future opportunities based upon emerging technologies and evolution of preventative health over the next 25 years
  - Forecast of facility utilization
  - Forecast of revenues and expenses

## Preparing Report

- ▶ Summarize findings, key inputs, and assumptions
- ▶ Meet with management and key leaderships to discuss and validate findings
- ▶ Revise findings for clarifications identified during meetings with management and key leadership
- ▶ Develop draft findings and summary report
- ▶ Finalize summary report, incorporating management and key leadership’s comments

# Timeline and Estimated Hours of Work

With our industry experience and knowledge, we are prepared to begin this project as soon as we obtain your approval to proceed. Please see the chart below depicting the key milestones for this project.

**PROJECT TIMELINE IS SUBJECT TO CHANGE\***

	Phase 1: Research, Review, Categorize		Phase 2 Assess and Analyze				Phase 3 Prepare models, roadmaps, matrices, and final presentation			
	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8	Week 9	
Project Kick-Off Meeting	16									
Finalize client needs, scope, and deliverables	4									
Conduct industry literature research	10	5								
Complete comprehensive review and assessment of FRHD’s “present state” to include (at minimum) programs, services, operations, organizational structure, performance metrics, finances, facilities and technology, community needs assessment, and partnerships.	10	20	10	5						
Categorize existing programs and services to identify which have opportunity for revenue optimization (user fees, insurance reimbursement) or revenue augmentation (e.g. grant funding).	10	20	5	5						
Complete comprehensive market analysis of the local and surrounding Fallbrook Regional communities to provide a data-driven, market assessment of current and emerging trends where FRHD has an opportunity to provide, or create partnerships to provide, innovative preventive health programs and services.		5	20	15	10					
Provide market analysis needs to include a demand analysis for potential partnerships within the community				5	5	5				

\* hours are listed as the total number for the team

# Timeline and Estimated Hours of Work

	Phase 1: Research, Review, Categorize		Phase 2 Assess and Analyze				Phase 3 Prepare models, roadmaps, matrices, and final presentation			
	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8	Week 9	
Assess FRHD’s current programs and services relative to market study and identify where FRHD programs and services add value on the overall continuum of health care (preventive vs sick care) with respect to revenue generation or service value. Identify future opportunities based upon emerging technologies and evolution of preventive health over the next 25 years.			10	10	15	20	5			
Conduct gap analysis to identify structure, resources, and skills needed to meet identified opportunities and innovations. Analysis needs to address FRHD program and service delivery within the context of FRDH’s mission of promoting health for its community.			5	10	15	20	10			
Provide model and roadmap for how FRHD can position itself to meet current and future opportunities (timeline, estimated costs, skills, organizational structure, etc.)					5	5	15	25		
Provide matrix of fundraising options and considerations aside from tax revenue.							5	5		
Develop FRHD’s strategic direction about current and future programs, services, partnerships and innovations that optimize revenue generation and value creation, to support FRDH’s short-term and long-term strategic goals.							15	20	10	
Deliver final report preparation, presentation, and discussion									15	
<b>Hours</b>	<b>50</b>	<b>50</b>	<b>50</b>	<b>50</b>	<b>50</b>	<b>50</b>	<b>50</b>	<b>50</b>	<b>25</b>	<b>425</b>

# Professional Fees

## We are committed to quality, value-added service.

We understand the importance of efficiencies and cost control, and have specifically designed our advisory methodologies to provide your engagement team with the tools they need to perform high quality advisory services in as cost effective a manner as possible.

In addition, you may contact us at any time without additional charges. A collaborative relationship is important and BDO is committed to investing the necessary time to discuss your changes, challenges, and potential issues which may impact you and your business.

### We believe in complete transparency, which means:

- ▶ We quote services based on experience and realistic expectations to avoid unexpected fees.
- ▶ If you request special services outside the scope of services outlined in this proposal, we will discuss those services and provide management with a fee estimate related to such assistance. **We will not allow concerns about fees to jeopardize a relationship based on mutual trust and respect.**

### Our investment in FRHD means:

- ▶ BDO desires to invest in a long-term business relationship with FRHD. Accordingly, we will absorb certain initial project costs.
- ▶ BDO anticipates that FRHD will serve as an example of what can be achieved by other health districts and BDO will assist in promoting these achievements and showcasing FRHD.

### Our fee proposal:

We estimate project fees to be \$119,000. This is based on our preliminary understanding of the anticipated project scope and the level of BDO staffing required to complete this project in a short time period. We have calculated this according to the tables provided on the previous pages.

**We will require a \$20,000 retainer fee before beginning the project.**

We will invoice FRHD for our services every two weeks and payment is due upon receipt. Travel costs and any other out-of-pocket expenses will be billed separately and at actual cost. Back up receipts and any other requested documentation will be submitted. We will staff the team with a combination of local talent and national level experts to bring the greatest value to you.

### Our fee estimate is based on the following assumptions:

- ▶ The scope remains similar to what has been discussed and described in this proposal.
- ▶ Key documents are provided on the dates agreed and there are no significant delays outside of our control.

## PROFESSIONAL HOURLY RATES

Although we do not anticipate any out-of-scope fees related to this project, our blended hourly rate is \$300.





# The BDO Team

**BDO**<sup>®</sup>



## Project Staffing and Staff Continuity

We recommend a BDO project team with strong medical and healthcare business backgrounds to address the programmatic needs and revenue sources of a FRHD health education and wellness programs hub.

**The proposed key team members would include:**

- ▶ Karen Meador, MD, MBA, Managing Director and Senior Physician Executive, BDO Center for Healthcare Excellence & Innovation
- ▶ Gina M. Tapper, MBA, MSN, Clinical Fellow and Director, BDO Center for Healthcare Excellence & Innovation
- ▶ Steven Shill, CPA, CA, Assurance Partner and National Leader & Co-Founder, BDO Center for Healthcare Excellence & Innovation
- ▶ Chris Cooper, MIM, MHA, RN, Managing Director, BDO Center for Healthcare Excellence & Innovation
- ▶ Cortney Marcin, MPA, Managing Director, BDO Center for Healthcare Excellence & Innovation
- ▶ Other industry specialists (to be identified after our project kick off meeting)

### STAFF CONTINUITY

We understand the benefits to be gained both for our clients and for our own team in maintaining a consistent senior project team; we make every effort to achieve continuity.

Planning for staff availability is an essential element in the operational processes of our business and we can confirm that the team outlined in this document is the team you will see and work with for the duration of this assignment.

We recognize that on occasion team changes are inevitable. Should this arise, we will discuss the options with you and enable you to meet the potential new team members in advance. We will ensure any new resources are appropriately experienced and fully briefed. Any time spent briefing the new team member would, of course, be at our cost.



# BDO Healthcare Leaders Serving FRHD



## **KAREN MEADOR, MD, MBA**

Managing Director

kmeador@bdo.com / 214-259-1477



## **GINA TAPPER, MBA, MSN**

Clinical Fellow and Director

gtapper@bdo.com / 619-985-6054

Dr. Karen Meador, a board-certified pediatrician, has 25 years of healthcare experience, having served in numerous clinical and administrative leadership roles within healthcare systems and primary care organizations. Karen has expertise in leading collaborative multidisciplinary teams in creating and expanding innovative high-quality programs and services that transform and integrate clinical care, research and education and that engage physicians and patients in hospital and community settings.

She has extensive experience with Medicaid-supported programs, designing and implementing cost-saving and quality-improvement initiatives for health systems, primary care networks—including Federally Qualified Health Centers (FQHCs)—and physician groups. Karen has been a leader in New York State Medicaid reform, advising eight Performing Provider Systems in their Delivery System Reform Incentive Payment Program (DSRIP) initiatives. She has also provided guidance and conducted due diligence for investors in healthcare provider organizations, focusing on clinical quality, operational issues, and billing and compliance matters to reduce risk and increase financial returns.

Karen has served as a persuasive expert on the medical necessity of medical and behavioral health services in disputes between providers and payers and in self-disclosure matters to the Centers for Medicare & Medicaid Services (CMS).

Karen also served as an Emergency Medicine and Urgent Care Pediatrician at the Children’s Hospital of Philadelphia.

### **EDUCATION**

M.B.A., The Wharton School, University of Pennsylvania  
Pediatrics Residency, The University of Texas Health Science Center at San Antonio  
M.D., The University of Texas Health Science Center at Houston  
B.A., Rice University

Gina Tapper has over 30 years of healthcare advisory experience in the San Diego and Southern California region. Her clients include Scripps Health, Sharp Health, the San Diego First 5 Commission, UC Irvine Health, and the Children and Families Commission of Orange County Health Services, among others. Ms. Tapper has a unique skillset as both a clinician and a business executive. Her areas of expertise include feasibility studies, clinical and operational reviews, organizational reviews and strategic planning.

Ms. Tapper is on the Board of Trustees of the Seacrest Village Retirement Communities dba San Diego Hebrew Homes (operating board), a California-based senior housing and healthcare organization that serves the Jewish community. Prior to serving on the board, she conducted a feasibility study and market assessment to open a home care company owned by Seacrest, a CCRC. Recently, she was asked to serve on the Seacrest At Home Board of Directors. The board is currently conducting a community needs assessment for the senior community. Ms. Tapper also served on the Institutional Review Board of San Diego Hospice, (now part of Scripps Health).

Ms. Tapper established Tapper & Associates, consultants to the healthcare industry, after working at PwC for six years. Before entering business school, she was a Clinical Nurse Specialist at Massachusetts General Hospital (MGH) Department of Pediatric Neurology/Eunice Kennedy Shriver Center in Boston, and an Associate Clinical Professor of Pediatric Nursing at Boston University Graduate School of Nursing.

### **PROFESSIONAL AFFILIATIONS**

Healthcare Business Women’s Association, member

### **EDUCATION**

B.S.N. Georgetown University  
M.S.N. University of Pennsylvania  
M.B.A. Northwestern University Kellogg School of Management

# BDO Healthcare Leaders Serving FRHD



## STEVEN SHILL, CPA, CA

Assurance Partner and National Leader & Co-Founder

sshill@bdo.com / 714-668-7370

Steven has more than 25 years of public accounting and consulting experience with two global accounting/advisory firms serving a variety of publicly and privately held companies (including nonprofits and NGOs) in the healthcare, finance, and insurance, sectors. During this period he also spent a number of years working in private industry as a senior manager with an actuarial/risk management consulting company which was part of a multi-national publicly traded corporation.

Steven's experience in public accounting over the years has been global. Steven qualified as a Chartered Accountant and worked as a Public Auditor in South Africa for many years prior to joining BDO in the USA. This experience included providing healthcare and social programs such as USAID operating in Africa with audit and accounting services.

Steven's extensive experience in public accounting and consulting has seen him serve hospitals, nursing homes, medical insurance plans, physician groups, dental organizations and other healthcare related industries, such as drug testing, pharmaceuticals, urgent care services, surgery centers, and behavioral health providers. Steven's services to healthcare organizations include audits (inclusive of SEC and SOX compliance), risk assessment consulting, financial feasibility and debt capacity studies, internal control reviews and various other consulting services such as litigation support.

## EDUCATION

Post Graduate Honors Degree in Accounting Science,  
University of South Africa  
B.S., Commerce, University of the Witwatersrand



## CHRIS COOPER, MHA, MIM, RN

Managing Director

ccooper@bdo.com / 404-979-7209

Chris has over twenty years of experience focusing on operational, strategic and design initiatives and their interrelationship as transformative tools for healthcare delivery. Most recently, Chris was a Principal and leader of Blue Cottage of CannonDesign, where he served in the role of senior nurse executive and clinical thought leader, providing insight on the future of healthcare, strategic planning, clinical process optimization, and experiential design to solve facility and non-facility challenges.

Prior to joining CannonDesign, he served in the Health Industries Advisory Practice at PwC, where he was engaged in strategic planning, physician alignment, and operational improvement consulting and was a Subject Matter Expert in Pediatrics and Oncology. Previous to that association, he held positions at Children's Hospital of Wisconsin in Milwaukee, where he served as the Clinical Director of Hematology, Oncology and Transplant services; and at Sg2, an international healthcare intelligence, research and consulting organization in Chicago, where he served as Director of Cancer and Nursing Services.

## CLINICAL EXPERIENCE

Children's Hospital of Wisconsin, Clinical Director,  
Hematology/Oncology/Transplant  
Lurie Children's, Nurse,  
Hematology/Oncology/Transplant  
Memorial Sloan Kettering Cancer Center, Nurse,  
Pediatrics

## EDUCATION

M.H.A., Washington University in St. Louis  
M.I.M., Washington University in St. Louis  
A.D.N., Phillips Beth Israel School of Nursing  
B.S., Industrial Engineering, Purdue University

# BDO Healthcare Leaders Serving FRHD



## **CORTNEY MARCIN, M.P.A.**

Managing Director,

[cmarcin@bdo.com](mailto:cmarcin@bdo.com) / 212-885-8242

Cortney has more than ten years of experience working as a project leader and consultant for state and local government health and human services agencies, free standing hospitals, large healthcare systems and outpatient care.

Cortney's project leadership has focused on physician engagement and alignment including utilizing data analytics to drive decisions focused on cost, quality outcomes, and population health. She recently led the New York Delivery System Reform Incentive Payment Program application process for a local Performing Provider Organization, developing a strategic application for \$220 million in government funding. Her team leadership resulted in design of an implementation roadmap, funds flow strategy, and early workforce estimates.

Further Cortney has worked on behalf of state governments across the country, in various capacities around compliance with federally funded and state administered programs including audit preparation and Office of the Inspector General (OIG) program audits. Her work spans various program areas including the implementation of Medicaid State plans, Tile IV-E foster care, the Childcare benefit, Temporary Assistance for Needy Families (TANF), among others. Additionally Cortney has assisted in the implementation of program integrity initiatives in the areas described above. Finally, Cortney is skilled in large-scale project management, including developing and leading Project Management Offices for hospital clients in addition to hiring, training and supervising large engagement teams.

## **EDUCATION**

M.P.A, Health Care Administration, Syracuse University  
B.A., Political Science, Syracuse University

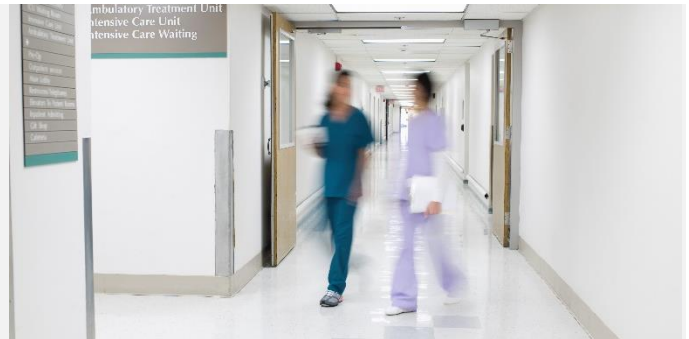




# Relevant Experience



# Select Advisory Experience



## *Alliance Healthcare Services*



BDO was engaged to provide financial and operational services with the objective of improving financial performance and analyzing strategic alternatives.

## *Beacon Interdependent Practice Organization, LLC*



BDO conducted a strategic, financial, and operational assessment of Beacon's physician practice to roadmap a new corporate strategy.

## *Brookhaven FQHC*



BDO devised a strategic plan to consolidate two outdated community health centers into a Federally Qualified Health Center.

## *Brown & Toland*



BDO designed a five year growth plan for this large physician group by assessing local health needs and future facility locations.

## *Developmental Disabilities Institute*



BDO developed a model depicting the regulatory and financial impact of converting the facility to an FQHC.



## Select Advisory Experience

### *Exact Sciences*



BDO reviewed clinical, financial and sales data to inform a strategy to sustain competitive advantage while maintaining company value.

### *Manhattan Surgery Center*



BDO conducted a comprehensive clinical, operational, and financial review to guide the client in making strategic growth and ownership decisions.

### *MedEquities*



BDO provided due diligence and market forecasts by utilizing local, state and federal data to assist in the decision to acquire several skilled nursing facilities.

### *Phoenix House Foundation*



**Phoenix House**  
Rising Above Addiction

BDO devised a sustainable turnaround plan for the organization's finances by restructuring critical departments.





## Select Advisory Experience

### *Richmond University Medical Center & Staten Island Mental Health*



BDO explored potential clinical and financial synergies of a merger between the nonprofit hospital and a local mental health facility.

### *Select Medical Corporation*



BDO advised Select Medical Corporation, a large scale provider network, on creating strategic partnerships with nonprofit organizations.

### *Staten Island PPS*



BDO developed and implemented materials for educating and engaging key stakeholders around the design of the DSRIP program, an initiative aimed at reforming care delivery to the Medicaid population.

# The BDO Center for Healthcare Excellence & Innovation



**BDO**<sup>®</sup>

# The Center for Healthcare Excellence & Innovation

The BDO Center for Healthcare Excellence & Innovation brings together the best minds from different disciplines to think in new ways about how to address challenges and seize opportunities in healthcare. Our goal is to deliver fresh insights to our clients and help them implement change.

In today's competitive healthcare environment, it takes sound structure, exceptional talent and ample support to deliver high performance. BDO understands the healthcare industry and is skillfully positioned to help our clients thrive and prosper in challenging times. Our professionals have applied their in-depth knowledge and experience to organizations across the continuum of the healthcare delivery horizon.

Today's dynamic healthcare environment - marked by intensifying demands from government, the private sector and consumers - is compelling industry professionals and institutions to develop new ways of doing business, when the definition of "business as usual" changes every day.

We leverage insight and experience across all aspects of the healthcare industry to help organizations anticipate change and overcome the many hurdles associated with risk-based reimbursement, policy change, and clinical outcomes. We help our clients find new opportunities to improve performance in the short-term as well as achieve longer-term transformational change.

Our practice brings together healthcare leaders with deep healthcare experience across financial, clinical, operational, data analytics, and legal disciplines. BDO is committed to a uniquely collaborative culture that breaks down barriers, building bridges between the many disciplines required to create robust organizational change, creating seats at the table for all invested parties.

## The BDO Center for Healthcare Excellence & Innovation works with:

- ▶ Hospitals & Health Systems
- ▶ State & Local Government
- ▶ Law Firms
- ▶ Long-Term Care
- ▶ Payers
- ▶ Physician & Other Provider Groups
- ▶ Private Equity & REITs
- ▶ Social Service Organizations

We work closely with our clients, matching our resources to the complex and unique needs of each. Our seasoned professionals include:

- ▶ Healthcare Executives
- ▶ Clinical Practitioners
- ▶ Financial Analysts
- ▶ Economists
- ▶ Statisticians
- ▶ Investment Bankers
- ▶ Forensic Technologists
- ▶ Tax Accountants
- ▶ Auditors
- ▶ Regulatory Specialists

## FRHD will realize the following benefits if it selects the BDO Center for Healthcare Excellence & Innovation:

- ▶ A customized and flexible project approach to meet a tight timeframe
- ▶ FRHD staff participation on the project team
- ▶ Access to an interdisciplinary team of healthcare experts with hands-on clinical, operational, and financial experience
- ▶ Access to healthcare specialists with knowledge of revenue-generating healthcare programs and services
- ▶ Access to consultants with familiarity with many senior living communities and innovative models of care
- ▶ Engagement of consultants who have successfully completed many similar health care program planning projects

## BDO HEALTHCARE KNOWS: Healthcare Redesign

### Redesigning healthcare and social programs - and your organization.

Health systems are getting squeezed. They're being called on to do more for less, and to achieve better health outcomes in the process. They're grappling with a re-alignment of financing, capital, and clinical delivery activities. And on top of it all, they are facing shifts in risk and financial responsibility for payment of care - from payers to providers, from providers to consumers, and from employers to employees.

The implications of this reassignment are profound. As healthcare organizations move forward into an era of unprecedented change, they will have to achieve widespread financial, clinical, and operational transformation. In this environment, anticipating and understanding the future state model of healthcare is essential.

BDO guides clients as they plan and implement new strategies to redesign and thrive. We work closely with clients to determine the total cost of care, envisage future-state models, and design organizational strategies for transformation. Our services span the healthcare landscape - from understanding the needs of local markets to assessing capital needs.

Additionally, BDO's multidisciplinary teams are experienced in population health, health policy, financial, visual and data analytics, and healthcare operations. We leverage these capabilities to help physician groups, hospitals, behavioral health organizations, long-term care facilities, payers, and other systems across the continuum support the shift to value-based reimbursement and vertical integration of clinical care.



#### Our services include:

- ▶ Accountable Care and Clinical Integrated Network Strategies
- ▶ Financial Improvement
- ▶ Financial, Future State, and Risk Models
- ▶ Governance and Organizational Structure
- ▶ Human Capital Strategies and Operational Models
- ▶ Interim Management Services
- ▶ Medicaid Waiver and Innovation Grant Implementation
- ▶ Physician Alignment and Engagement
- ▶ Population Health Management



# Healthcare Industry Leadership

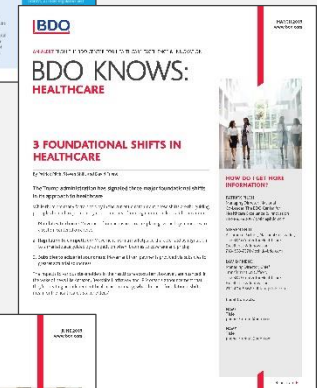
BDO's industry leaders are at the forefront of the healthcare conversation, remaining active in organizations and associations and contributing research and insights regularly to a wide variety of news outlets, trade publications, webinars, events, and thought leadership.

We value the importance of industry participation as a key opportunity to increase our knowledge on industry trends and issues, and cultivate conversations to keep our clients up-to-date as changes happen.

## PUBLICATIONS AND TECHNICAL UPDATES

We share our knowledge through a variety of thought leadership, keeping clients abreast of relevant news and hot topics that go beyond balance sheets and financial statements.

- ▶ **BDO Knows Healthcare**, a quarterly newsletter examining issues and trends affecting healthcare organizations
- ▶ **BDO Nonprofit Standard**, a newsletter that provides financial information for tax-exempt organizations
- ▶ **BDO 600: Healthcare**, a study conducted annually examining board compensation practices of 600 mid-market public companies with annual revenues between \$25m and \$1b
- ▶ **Perspective in Healthcare**, features examining the role of private equity in the healthcare industry
- ▶ **Significant Accounting & Reporting Matters**, a quarterly guide on the latest corporate governance and financial reporting developments
- ▶ **Client Advisories**, concise and timely commentary, analysis and insights on events and trends



# Healthcare Industry Leadership

## BDO KNOWS HEALTHCARE: THE BLOG OF THE BDO CENTER FOR HEALTHCARE EXCELLENCE & INNOVATION

The BDO Knows Healthcare [blog](http://healthcareblog.bdo.com) (<http://healthcareblog.bdo.com>) is a resource and discussion platform focused on critical issues impacting the industry and re-defining the future of care. Our posts explore how reimbursement and regulatory changes re-shaping provider and payer business models, covering both the financial and clinical implications and drawing on our depth of experience in healthcare finance, operations and clinical practice. We will also touch on the myriad compliance and risk management challenges healthcare organizations face, as well as M&A and capital strategies.

### BDO KNOWS HEALTHCARE

THE **BLOG** OF THE BDO CENTER FOR HEALTHCARE EXCELLENCE & INNOVATION

#### EVENTS

BDO events bring our community together in an online and offline setting to connect with each other and share insights into the topics and trends important to your industry.

#### Recent events offered in the healthcare industry include:

- ▶ **Webinar:** The Future of Drug Pricing and Healthcare Reimbursement
- ▶ **Webinar:** How to Survive the Mandated IRS Review of Your Hospital
- ▶ **Event:** Healthcare Under Cyber Siege Panel Event
- ▶ **Webinar:** Bundled Payments for Total Joint Replacement: Early Indications from the First 90 Days



#### INDUSTRY ASSOCIATION & EVENT PARTICIPATION

- ▶ **[Healthcare Financial Management Association \(HFMA\) Annual National Institute \(ANI\)](#)**, HFMA is the nation's premier membership organization for healthcare finance leaders. BDO sponsors the Healthcare Financial Management Association's ANI nationally every year and has membership and involvement with regional and local chapters throughout the U.S;
- ▶ **[National Investment Center](#)**, The National Investment Center for the Seniors Housing & Care Industry (NIC) is a 501(c)(3) organization whose mission is to facilitate informed investment in the long-term care space. Members of national Healthcare group are active members of NIC, and BDO is the only accounting firm sponsor of NIC's national conference (held in October) and regional conference (held in March);
- ▶ **[The Advisory Board Company](#)**, BDO is a corporate member of The Advisory Board Company, a global research, technology, and consulting firm partnering with 125,000 leaders in 3,700 organizations across health care and higher education. Through its innovative membership model, the firm collaborates with executives and their teams to elevate performance and solve their most pressing challenges;
- ▶ **American Health Care Association**
- ▶ **LeadingAge** (previously American Association of Homes and Services for the Aging, AAHSA)
- ▶ **Medical Group Management Association**
- ▶ **American Health Lawyers Association**
- ▶ **Wharton Healthcare Conference**
- ▶ **Harvard Healthcare Alumni Association**
- ▶ **AICPA Healthcare Conferences**





Required  
Disclosures



# Disclosures

## **BDO COMPANY INFORMATION**

### **Headquarters:**

330 North Wabash Avenue, Suite 3200  
Chicago, IL 60611  
Phone: 312-856-9100  
Fax: 312-856-1379

### **Disclosure of BDO ownership structure:**

BDO USA, LLP is a Limited Liability Partnership with no individual owner owning more than 4.9 percent of the entity.

### **Disclosure regarding terminated contracts within the last five years:**

BDO affirms that to the best of our knowledge, no major contract has been terminated for any reason within the last five years by BDO and/or Subcontractors responding to that RFIP.

A photograph showing a man in a wheelchair being pushed by another man from behind. They are walking on a paved path that runs along a large body of water. In the background, there are rolling hills or mountains under a bright sky. The man in the wheelchair is wearing a dark polo shirt and blue jeans. The man pushing him is also wearing a dark polo shirt and blue jeans. The scene is captured from a rear perspective, looking down the path.

## Insurance Requirements

**BDO**<sup>®</sup>





# CERTIFICATE OF LIABILITY INSURANCE

DATE(MM/DD/YYYY)  
04/03/2018

**THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.**

**IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).**

<b>PRODUCER</b> Aon Risk Services Northeast, Inc. New York NY Office 199 Water Street New York NY 10038-3551 USA	<b>CONTACT NAME:</b> PHONE (A/C. No. Ext): (312) 381-1000      FAX (A/C. No.): (312) 381-7007 E-MAIL ADDRESS:														
<b>INSURED</b> BDO USA, LLP 770 Kenmoor SE, Suite 300 Attn: Patricia Schrand Grand Rapids, MI 49546 USA	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 80%;">INSURER(S) AFFORDING COVERAGE</th> <th style="width: 20%;">NAIC #</th> </tr> </thead> <tbody> <tr> <td>INSURER A: The Continental Insurance Company</td> <td>35289</td> </tr> <tr> <td>INSURER B: National Fire Ins. Co. of Hartford</td> <td>20478</td> </tr> <tr> <td>INSURER C: Transportation Insurance Co.</td> <td>20494</td> </tr> <tr> <td>INSURER D: American Casualty Co. of Reading PA</td> <td>20427</td> </tr> <tr> <td>INSURER E:</td> <td></td> </tr> <tr> <td>INSURER F:</td> <td></td> </tr> </tbody> </table>	INSURER(S) AFFORDING COVERAGE	NAIC #	INSURER A: The Continental Insurance Company	35289	INSURER B: National Fire Ins. Co. of Hartford	20478	INSURER C: Transportation Insurance Co.	20494	INSURER D: American Casualty Co. of Reading PA	20427	INSURER E:		INSURER F:	
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INSURER E:															
INSURER F:															

Holder Identifier :

**COVERAGES      CERTIFICATE NUMBER: 570070723814      REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS. Limits shown are as requested

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS		
B	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input checked="" type="checkbox"/> LOC OTHER:			6012318939 General Liability	03/31/2018	03/31/2019	EACH OCCURRENCE	\$1,000,000	
							DAMAGE TO RENTED PREMISES (Ea occurrence)	\$1,000,000	
							MED EXP (Any one person)	\$5,000	
							PERSONAL & ADV INJURY	\$1,000,000	
							GENERAL AGGREGATE	\$2,000,000	
							PRODUCTS - COMP/OP AGG	\$2,000,000	
B	<input type="checkbox"/> AUTOMOBILE LIABILITY  <input type="checkbox"/> ANY AUTO <input checked="" type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY			6012318956 Automobile	03/31/2018	03/31/2019	COMBINED SINGLE LIMIT (Ea accident)	\$1,000,000	
							BODILY INJURY (Per person)		
							BODILY INJURY (Per accident)		
							PROPERTY DAMAGE (Per accident)		
A	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED    RETENTION			6057003378 Umbrella Policy	03/31/2018	03/31/2019	EACH OCCURRENCE	\$5,000,000	
							AGGREGATE	\$5,000,000	
D D C	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR / PARTNER / EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N <input type="checkbox"/> N/A		WC 5085008884 WC 5085008870 WC 5085008898 Workers Compensation	03/31/2018 03/31/2018 03/31/2018	03/31/2019 03/31/2019 03/31/2019	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTHER		
								E.L. EACH ACCIDENT	\$1,000,000
								E.L. DISEASE-EA EMPLOYEE	\$1,000,000
								E.L. DISEASE-POLICY LIMIT	\$1,000,000

Certificate No : 570070723814


DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

**CERTIFICATE HOLDER**

**CANCELLATION**

Evidence of Insurance	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  AUTHORIZED REPRESENTATIVE  <div style="text-align: center; font-family: cursive; font-size: 1.2em;">                     Aon Risk Services Northeast, Inc.                 </div>
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# FALLBROOK REGIONAL HEALTH DISTRICT

## Request for Introductory Proposal for Strategic Consulting Services for Development of a Community Health & Wellness Center

October 9, 2019





October 9, 2019

Rachel Mason, MS, MA, Executive Director  
Fallbrook Regional Health District  
138 South Brandon Rd.  
Fallbrook, CA 92028

Dear Rachel,

Catalyst, a division of FreemanWhite, Inc. (Catalyst), is pleased to have the opportunity to present our experience and qualifications to partner with the Fallbrook Regional Health District (FRHD) to provide Strategic Consulting Services for development of a Community Health & Wellness Center. With the closure of the Fallbrook Hospital and the purchase of a 4.5-acre property on E. Mission Road in early 2018, the community is eagerly waiting for access to a community-based health education and wellness hub. We understand this project is critical to FRHD to advance its mission of *"Promoting health for the residents of Bonsall, De Luz, Fallbrook, and Rainbow."*

Our response to your Request for Introductory Proposal (RFIP) for Strategic Consulting Services to inform the development of the Community Health & Wellness Center is based on the multiple conversations that occurred between Debbie Jacobs and Michelle Mader of our firm and Rachel Mason, Howard Salmon, and Jennifer Jeffries of the FRHD, as well as the RFIP received on September 20, 2019. We appreciate the opportunity to guide some of your early thinking around the planning of the Community Health & Wellness Center. Catalyst looks forward to continuing our relationship with you and your team, and evolving the vision of the Community Health & Wellness Center to include current and future programs and services, partnerships, and innovations to optimize the potential of the campus while ensuring alignment with the needs of the community. This RFIP is an important first step in the process to improve the overall health and well-being of individuals of all ages living in the District.

Catalyst, a healthcare consultancy, has been in business for 25+ years and is devoted to bringing customer-driven health and wellness solutions to organizations across the country. Catalyst identifies innovative strategic, operational, financial, and facility planning initiatives for organizations to optimize the customer's health status while improving access and experience. The shift from fee-for-service to value-based reimbursement, together with consumerism, digital health, bioelectronic medicine, and other trends, has changed the focus from healthcare to total health. Social Determinants of Health (SDOH), i.e., economic stability, education, social and community context, health access/literacy, and neighborhood/built environment, contribute to 80% of an individual's total health, while healthcare services contribute only 20%. FRHD has a once-in-a-lifetime opportunity to create an innovative total health model that focuses on addressing the SDOH.

Debbie Jacobs, MBA, PT, FACHE, will serve as the Project Executive and be responsible for your complete satisfaction with the planning process and outcomes. Debbie will be supported by experienced consultants who bring a national perspective on trends in health and emerging technologies, as well as an appreciation of the local market dynamics and stakeholders. Our team members have experience in strategic planning and community needs assessment, capabilities in data-driven market analysis, and understanding of numerous population health initiatives and the process to build sustainable community-based organization partnerships.

The Catalyst team is delighted to present our health and wellness qualifications and hope to be given the opportunity to further demonstrate our experience and innovative health solutions. If you have questions about any aspect of this introductory proposal, please feel free to contact Debbie Jacobs at 630.745.9769.

Best regards,

Debbie Jacobs  
Director, West Region  
Catalyst, A Division of FreemanWhite





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# PROJECT PURPOSE AND OBJECTIVES





## Project Purpose and Objectives

Fallbrook Regional Health District (FRHD) is a public agency with a mission of “*Promoting health for the residents of Fallbrook, De Luz, Rainbow, and Bonsall.*” FRHD provides funding to numerous community health contract holders to facilitate a wide range of innovative health and wellness programs that promote healthy lifestyles, physical health and fitness, emotional balance, and the provision of basic needs. With the closure of the Fallbrook Hospital in November 2015, the sale of the property and hospital buildings in 2017, and the purchase of a 4.5-acre property with a church, parsonage house, and eight-room preschool for the intended purpose of a Community Health & Wellness Center, the FRHD Board is now soliciting introductory proposals to qualify consultants to meet the specific scope of services required in this Request for Introductory Proposal (RFIP) to provide Strategic Consulting Services.

Through our response, Catalyst will demonstrate not only our deep analytical capabilities and broad experience across the continuum of health programs and services, but also our tireless commitment to exceptional performance standards and passion to provide the residents of FRHD with the preventive and wellness programs that will help them enjoy a healthy, fulfilling life.

### PROJECT PURPOSE

The purpose of the project is for the selected consultant partner to inform FRHD's strategic direction regarding current and future community needs, programs and services, partnerships, and innovations to support and sustain the Community Health & Wellness Center. The provision of preventive and well-being programs and services will be intergenerational; will not discriminate between ages, backgrounds, and socioeconomic status; and will facilitate engagement in healthy behaviors and development of meaningful connections for a lifetime.

### PROJECT OBJECTIVES

Catalyst team members have the skills and knowledge needed to achieve the following project objectives:

- Conduct a community needs assessment using robust demographic, lifestyle, disease incidence, and market data analytics in combination with direct voice-of-the-customer feedback to identify current and future needs;
- Carry out a comprehensive, data-driven market analysis of the local and surrounding communities to identify resources available in the community and potential community-based organization (CBO) partnerships to bring value and innovative programs to District residents;
- Identify both local and national emerging trends in health delivery, reimbursement, legislation, technologies, and innovations to inform opportunities to offer best practice preventive and wellness programs and create new partnerships;
- Assess the current state programs and services offered to residents of the District;
- Define the future program and service portfolio based on synthesis of the community needs, market analysis, and emerging trends;
- Evaluate the FRHD's infrastructure to support future programs and services, including operations, organizational structure, finances, facilities, technologies, and partnerships;
- Develop a gap analysis that defines the people, processes, spaces, technologies, capabilities, and investments needed for FRHD to evolve from its current state to its future state vision of programs and services; and,
- Create a roadmap or implementation plan to define the tactical steps necessary for FRHD to move from its current state to future state, including timeline, actions, estimated costs, resource needs, and accountable parties.



A group of women are sitting in a row on the floor in a yoga studio, practicing meditation. They are all wearing athletic wear and have their eyes closed. The background is a plain, light-colored wall. The text "FIRM QUALIFICATIONS AND EXPERIENCE" is overlaid in a semi-transparent white box across the middle of the image.

## FIRM QUALIFICATIONS AND EXPERIENCE





## Firm Qualifications and Experience

Catalyst is a healthcare consultancy devoted to bringing customer-driven wellness and health solutions to organizations across the country, and has completed more than 100 projects over the past three years (see Appendix for full list of projects and relevant case studies). Catalyst identifies innovative strategic, operational, and facility planning initiatives for health organizations to optimize customers' health and experience while improving access and reducing costs. As informed consumers play a bigger role in the selection of their health and wellness providers, value, quality, convenience, and experience are increasingly important. Our highly experienced consulting professionals are dedicated to bringing forward innovative and implementable solutions that respond to the unique health needs of the local community with an appreciation of national trends in population health, health delivery, reimbursement, legislation, and new technologies. Catalyst understands that building partnerships with community-based organizations (CBOs) that add value and are sustainable over time is critical to the success of your health and wellness center. Catalyst has experience in identifying and facilitating the creation of mutually beneficial relationships between the CBOs and health and wellness centers that align around a shared mission for the community.

### WELLNESS AREAS OF EXPERTISE



#### STRATEGY

- Community Needs Assessment
- Market Analysis
- Business/Strategic Planning
- Customer Experience Visioning
- Partnership Alignment
- Implementation Plan
- Financial Feasibility Analysis



#### OPERATIONS

- Functional Programming
- Operational Process Flows
- Staffing
- Organizational Assessment
- Operational Metrics
- Operations-Led Facility Design
- Activation Planning



#### FACILITY PLANNING

- Block/Stacking Drawings
- Site Planning
- Adjacencies
- Code Requirements
- Space Planning
- Capital Costs





# Catalyst Brings Value to Your Project.



## HEALTH-FOCUSED

Our passion is to improve the total health of individuals in each and every community. We bring knowledge on trends across the country relative to care delivery, population health, reimbursement, legislation, emerging trends, and innovations to each engagement.

## EXPERIENCE WITH WELLNESS

We support our clients to promote health in the communities they serve. Our broad experience in helping health systems address Social Determinants of Health and providing strategic direction to develop a wellness center enables Catalyst to bring innovative ideas and lessons learned to each new engagement.

## HEALTH IS LOCAL

While Catalyst has national expertise and knowledge, we believe that health solutions are local. Our extensive client work in San Diego County gives us a deep appreciation of the local market dynamics, including California-specific legislation and reimbursement trends, health and community-based resources, potential future partners, and the demographics and lifestyles of the local residents.

## 80% REPEAT CLIENTS

Our exceptional performance standards are why 80% of our business is from repeat clients. We develop solutions that are realistic and attainable given the unique circumstances of each client.

## COMMUNITY NEEDS ASSESSMENT

Determining community needs is based on quantitative and qualitative information. While robust data analytics is a critical input, we believe the voice of the customer is essential to understanding the specific needs and expectations of individuals in the community. Catalyst also solicits input from potential partners who value the health and well-being of the community.

## STRATEGIC PLANNING EXPERTS

Catalyst's solutions are strategically driven and financially sound. Our team has partnered with numerous organizations to advance an idea to a tangible result. We are experienced in visioning, facilitation, capability assessments, gap analyses, roadmap development and execution, partnership evaluation, and financial feasibility analyses.

## DATA-DRIVEN DECISION-MAKING

Catalyst provides the data and information needed to make informed decisions. Our engineers and data scientists have developed a proprietary analytical platform to efficiently and effectively put the data in your hands so you feel confident in your decisions and tradeoffs that inevitably need to be made.



## Experienced Leadership Team

Together our Leadership Team has over 90 years of experience in strategic planning, community needs assessment, market analysis, organizational assessment, industry trends, health and wellness service delivery, implementation planning, and financial analysis. Our team's combined subject matter expertise in health and wellness delivery trends and programming, along with our robust analytical platform and data analysis capabilities, set our team apart. In addition, Catalyst planners are licensed architects and have the skills and knowledge to bring future programs to life through drawings.

*Experience in translating the market and community needs analysis into programming priorities*

*Subject matter expertise in healthcare and wellness strategy, operations, future technologies, and trends*

*Dedicated to listening to the voice of the customer to meet or exceed customer experience expectations*

*Depth and breadth of analytical knowledge and tools for informed decision-making*

*Expertise in planning, programming, and design of health and wellness centers*

## LEADERSHIP TEAM

MICHELLE MADER  
PRESIDENT



DEBBIE JACOBS  
DIRECTOR, WEST REGION



SHARON CONKLIN  
DIRECTOR OF OPERATIONS



MINTA FERGUSON  
DIRECTOR OF FACILITY PLANNING



ERIN NELSON  
DIRECTOR OF STRATEGY





# Debbie Jacobs, MBA, FACHE

WEST REGION DIRECTOR  
PROJECT EXECUTIVE



## EDUCATION

- ♦ University of Michigan, BS, Physical Therapy
- ♦ Northwestern University, Kellogg School of Management, MBA

## YEARS OF EXPERIENCE

30+

## PROFESSIONAL AFFILIATIONS

- ♦ American College of Healthcare Executives, Fellow (FACHE)
- ♦ Lean Healthcare Certificate, University of Michigan
- ♦ Baldrige Examiner Training Experience Certificate
- ♦ San Diego Organization of Healthcare Leaders
- ♦ California Association of Healthcare Leaders

## RESPONSIBILITIES

For the past 30 years Debbie has focused on collaborating with healthcare systems and hospitals in California and across the country to develop innovative programs and facility plans. Debbie's passion is to improve the health and well-being of all communities and decrease the cost of healthcare so that it is accessible to all. Her training as a rehabilitation physical therapist and aerobics instructor, together with her three decades of healthcare consulting experience, gives her the foundation to provide expert advice in health and wellness programming and design. Incorporating the customer's point of view and experience expectations into the program and facility design is foundational to the work Debbie carries out for health and wellness centers, community medical villages, and ambulatory center planning projects.

## CONSULTING SKILLS

- ♦ Health trends and delivery
- ♦ Project management
- ♦ Strategic and program planning
- ♦ Customer experience expectation visioning
- ♦ Group facilitation and consensus building
- ♦ Community needs analysis
- ♦ Functional and space programming
- ♦ Partnership development
- ♦ Collaboration with architectural partners to develop and assess options
- ♦ Capital analysis and financial feasibility studies

## RELEVANT PROJECT EXPERIENCE

UC San Diego Health, San Diego, CA\*

Scripps Mercy, Chula Vista, CA

Scripps MD Anderson Cancer Center, San Diego, CA

Miller Children's Hospital, Long Beach, CA\*

Salem Health Rehabilitation Center and Fitness Center, Salem, OR\*

CHOC Children's Hospital Activation, Orange, CA\*

AMITA, Chicago, IL

Mission Hospital, Asheville, NC

UC Irvine, Irvine, CA

\*Completed prior to joining Catalyst





## Sharon Conklin, RN, MBA

HEALTHCARE OPERATIONS DIRECTOR  
OPERATIONS SUBJECT MATTER EXPERT



### EDUCATION

- ♦ Itawamba Junior College, ORT
- ♦ Florida State College, Nursing
- ♦ Kennesaw State University, BBA, MBA
- ♦ Academy of Art University, MFA

### YEARS OF EXPERIENCE

30+

### PROFESSIONAL AFFILIATIONS

- ♦ Medical Law of Miami, Risk Management
- ♦ License - Nursing - Florida
- ♦ American College of Healthcare
- ♦ Association Hospital Resource Material Management
- ♦ Association of Operating Room Nurses
- ♦ Association of Value Analysis Professionals

Sharon leads operational process improvement engagements for our healthcare clients. Trained by Edwards Deming in Total Quality Management (TQM), she has a proven track record in resolving systemwide optimization challenges, reducing operational cost, creating organizational alignment, and maximizing resource utilization. Sharon's background in nursing, business, and design gives her first-hand knowledge of the relationships between building structures, operational improvement and the customer experience.

### CONSULTING SKILLS

- ♦ Project management
- ♦ Business planning
- ♦ Team visioning facilitation and consensus building
- ♦ Operational performance modeling and dashboards
- ♦ Functional programming
- ♦ Partnership development
- ♦ Communication strategy development
- ♦ Financial analysis / pro forma development

### RELEVANT PROJECT EXPERIENCE

Tampa General Hospital, Tampa, FL

BayCare Mease Countryside Hospital, Safety Harbor, FL

Virginia Commonwealth University, Richmond, VA

University of Tennessee, Knoxville, TN

Allegheny Healthcare, Pittsburgh, PA

Scotland Health Care, Laurinburg, NC

University of Florida, Gainesville, FL

Wake Forest Baptist Health, Winston-Salem, NC

Beebe Healthcare System, Lewes, DE

Northeast Georgia Medical Center, Gainesville, GA

University Hospital, Augusta, GA

First Health, Pinehurst, NC



# Michelle Mader, MBA, MHA

PRESIDENT, CATALYST



Michelle combines a passion for healthcare with a talent for strategic thinking, empowering clients to navigate complex, fast-paced challenges. She is an effective leader who inspires innovation, creative solutions, and the delivery of concrete results. Her experience includes identifying growth opportunities and cultivating alignment within various types of health organizations.

### CONSULTING SKILLS

- ♦ Team facilitation and consensus building
- ♦ Organizational visioning
- ♦ Business and strategic planning
- ♦ Market analysis
- ♦ Community needs assessment
- ♦ Dashboards and analytics
- ♦ Development of Improvement Roadmaps
- ♦ Functional and space programming

### EDUCATION

- ♦ Auburn University, BS, Health Administration
- ♦ Georgia State University, J Mack Robinson College of Business, MBA, MHA
- ♦ American College of Healthcare Executives

### YEARS OF EXPERIENCE

16+

### RELEVANT PROJECT EXPERIENCE

Columbia St. Mary's Medical Center, Milwaukee, WI

St. Vincent Health System, Multi-Campus Master Plan, Indianapolis, IN

Sacred Heart Health System, Pensacola, FL

Bon Secours St. Francis Health, Multi-Campus Master Plan, Greenville, SC

Intermountain Healthcare, Salt Lake City, UT

Roper St. Francis Healthcare Mount Pleasant Hospital, Mount Pleasant, SC



# Erin Nelson, MHA

DIRECTOR, STRATEGY



## EDUCATION

- ♦ Master of Healthcare Administration, Cornell University
- ♦ Bachelor of Science, Accounting SUNY Oswego

## YEARS OF EXPERIENCE

8+

Erin assists healthcare leaders in translating their strategic initiatives into actionable implementation plans. She has a talent for drawing meaningful conclusions and insights that help clients move their organizations forward toward their vision. She is adept at recognizing opportunities to turn requirements and challenges into profitable market opportunities. Her project management approach keeps projects on schedule and ensures that final recommendations include buy-in from all stakeholders.

## CONSULTING SKILLS

- ♦ Project management
- ♦ Visioning
- ♦ Market and community needs assessments
- ♦ Business and strategic planning
- ♦ Benchmarking, analytics, and dashboards
- ♦ Facilitation of client in scenario development and assumptions
- ♦ Volume projections/forecast modeling
- ♦ Business case development

## RELEVANT PROJECT EXPERIENCE

Seton Healthcare, Austin, TX

Tahoe Forest Hospital, Truckee, CA

Glens Falls Hospital, Glens Falls, NY

St. Thomas Health System, Nashville, TN

Spectrum Health, Grand Rapids, MI

Carolina Medical Center-Main, Charlotte, NC

St. John Health System, Tulsa, OK

Via Christi Health System, Wichita, KS

St. Vincent's Health, Indianapolis, IN

Intermountain Healthcare Alta View Hospital, Sandy, UT



## Minta Ferguson, AIA, CDT, CSI, LEED AP

DIRECTOR, PLANNING



### EDUCATION

- ♦ Bachelor of Architecture  
Virginia Polytechnic  
and State University

### YEARS OF EXPERIENCE

12+

Minta works with project stakeholders to define the program, scope, and size of facility and master planning projects. By analyzing equipment needs, requirements, benchmarks, adjacencies, privacy, functionality, patient and staff flow, and codes, she creates functional space programs that meet the needs of user groups and patients.

### CONSULTING SKILLS

- ♦ Project management
- ♦ Team facilitation and consensus building
- ♦ Desired user experience visioning
- ♦ Rapid design sessions
- ♦ Functional programming
- ♦ Space programming and standards development
- ♦ Bubble diagrams and block drawings
- ♦ Outpatient building programming

### RELEVANT PROJECT EXPERIENCE

Baptist MD Anderson Cancer Center, Jacksonville, FL

Women's and Childrens Hospital / Baptist Entry Care Tower, Jacksonville, FL

BayCare Mease Countryside Hospital, Safety Harbor, FL

St. Peter's Health Partners, Albany, NY

St. Mary's Hospital, Monroe, NC

Sacred Heart Health System, Pensacola, FL

Columbia VA Medical Center, Columbia, SC

Salem VA Medical Center, Salem, VA

Via Christi Health System, Wichita, KS

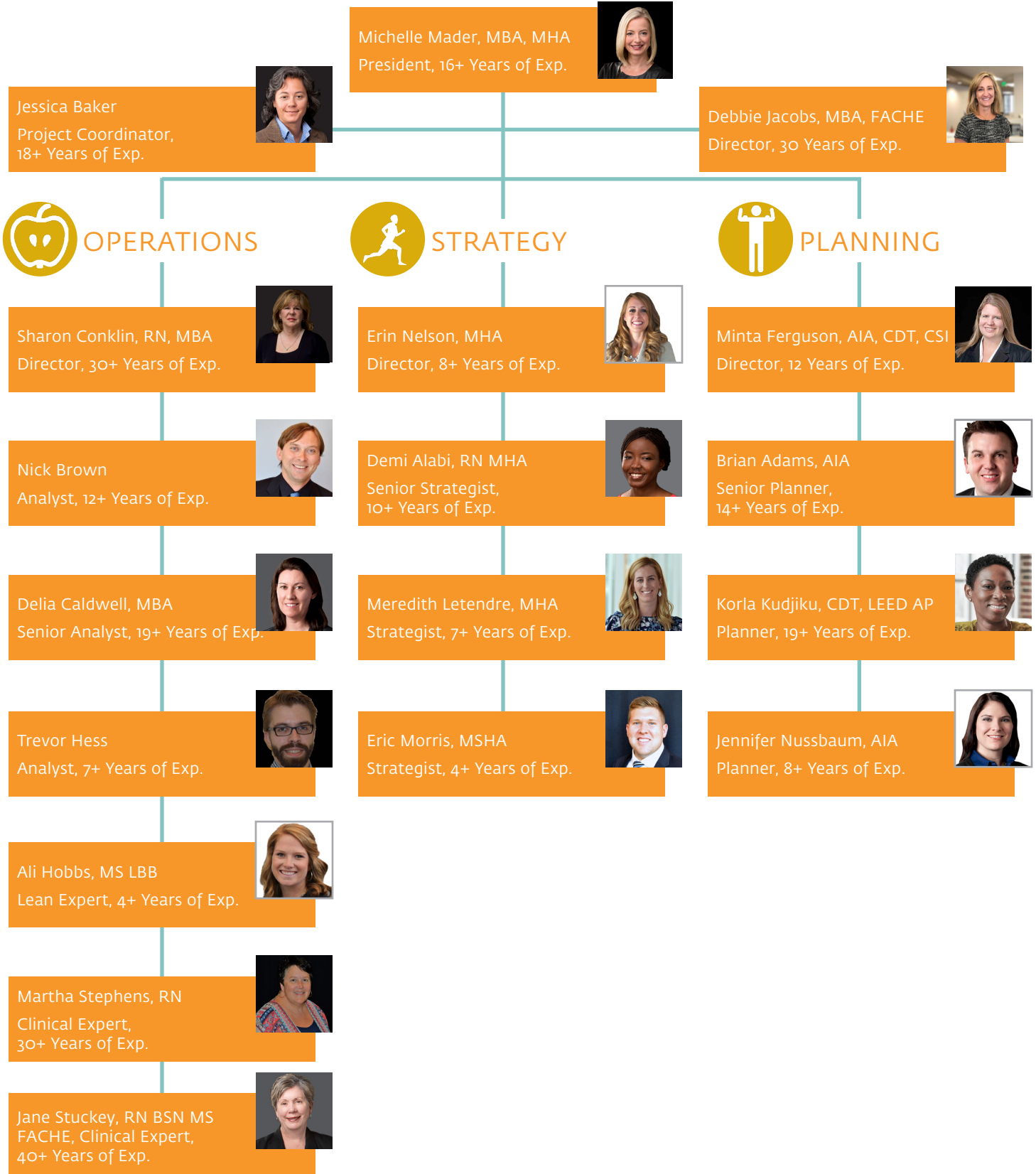
Via Christi Mercy Regional Hospital, Wlchita, KS





# Catalyst Team Members

The following organization chart depicts the depth and breadth of experience among the Catalyst team members. Catalyst also has relationships with over 20 affiliate staff who are utilized on projects for their highly refined expertise in a specific area.





## CATALYST APPROACH



## Catalyst Approach

Our approach is based on the philosophy that the voice of the customer is essential to inform the community needs assessment, and current and future program and service priorities for the new Community Health & Wellness Center. We will solicit input not only from your future users (District residents) but also from CBOs and other potential partners in the community who value the well-being of District residents. We will utilize the data and information you have already collected, as well as gather additional qualitative and quantitative information on demographics, disease prevalence, healthcare utilization, market dynamics, Social Determinants of Health (SDOH), service level expectations, and customer experience preferences to inform the strategic direction of the Community Health & Wellness Center. Our approach incorporates robust population health, market data analytics and voice-of-the-customer information, together with a knowledge of successful community-based programs across the country and emerging trends in health and wellness to inform strategic programming recommendations.

We facilitate a collaborative approach with our clients. We suggest a project organizational structure that provides for direct input from customers, stakeholders, and potential partners while the approval of recommendations sits with the Board of Directors. Debbie Jacobs will serve as the Project Executive. In this role Debbie will be your key point of contact and will be responsible for the quality of our deliverables and your complete satisfaction with the process and results. Debbie is a physical therapist by training and has over 30 years of healthcare consulting experience focused on customer experience, community needs assessment, market analysis, health best practices, and implementation. She has completed several programming projects for health and wellness centers, community medical villages, and ambulatory centers.

We suggest that FRHD assign a Project Executive to partner with Debbie to accomplish the project objectives. It is often helpful to charter a Project Team that functions as a work group to organize the community input sessions, collect information, review analyses and findings, and provide feedback on recommendations prior to presentation to the FRHD Board of Directors or a subcommittee of the Board. The Project Team will meet on a weekly basis, either in person or via video-conferencing, to keep the project moving forward. The Board of Directors is ultimately responsible for ensuring

the project purpose and objectives are achieved. We anticipate meeting with the Board of Directors or designated subcommittee at least monthly to present findings and recommendations throughout the project. We expect the members of the Board to sponsor and participate in the community forums and focus groups that will be conducted during the community needs analysis.

A critical component of our approach is the development of a community communication strategy and plan that proactively provides the right information to the right stakeholder at the right time via the right vehicle. We understand that there have been several communications to the community over the past couple of years, with the most recent communication being some time ago. To gain the confidence of the community and re-engage it in the Community Health & Wellness Center planning process, a thoughtful communication strategy and plan must be developed and implemented. The residents of Bonsall, De Luz, Fallbrook, and Rainbow are excited about the development of the Community Health & Wellness Center and with regular communications, the Board of Directors can assure residents progress is being made.

Our project management methodology provides for sufficient time at the start of a project to put the project management structure in place to support a successful outcome. Starting with the end in mind, our team will collaborate with the FRHD's Project Leadership to







finalize the detailed project schedule and specific project outputs and deliverables. We will utilize the following project management tools and tactics:

- **Project Work Plan** incorporates work efforts of all stakeholders, noting decision points and dependencies, as well as opportunities to run parallel activities to shorten the cycle time. The creation of an agreed-upon work plan at the start of the project articulates accountabilities, milestones, and deliverables necessary to achieve the overall project purpose and objectives in the timeframe allotted.
- **Decision-Making Process** is critical to minimize rework or overproduction of work efforts. The work plan provides that critical information and data are available to make the necessary decisions to keep the project on schedule.
- **Team Structure and Charters** provide that the individuals who have the content knowledge and administrative oversight are represented on teams to allow decisions to be made without delays. Charters clearly define the roles and responsibilities of the team so that there is no confusion as to who does what. Team members are expected to operate at the top of their license in contributing to discussions and decision-making.
- **Issues List, Decisions List, and Action Items** are additional project management tools that ensure issues that could affect the project schedule are resolved, decisions that are made are not renegotiated, and individuals are held accountable for action items to move the project forward.
- **Communication/Transparency** is addressed through the development of an electronic "Project Site" that provides for the sharing of information without the need to email large files to many individuals and enables "version control." A communication plan is developed to ensure the right messages are delivered to the right stakeholders at the right time.
- **Minimize Travel** for both FRHD project participants located throughout the District and consultants who may be remote by using video-conferencing technology. Some of the Catalyst team members are in San Diego, allowing for reduced travel time and costs.

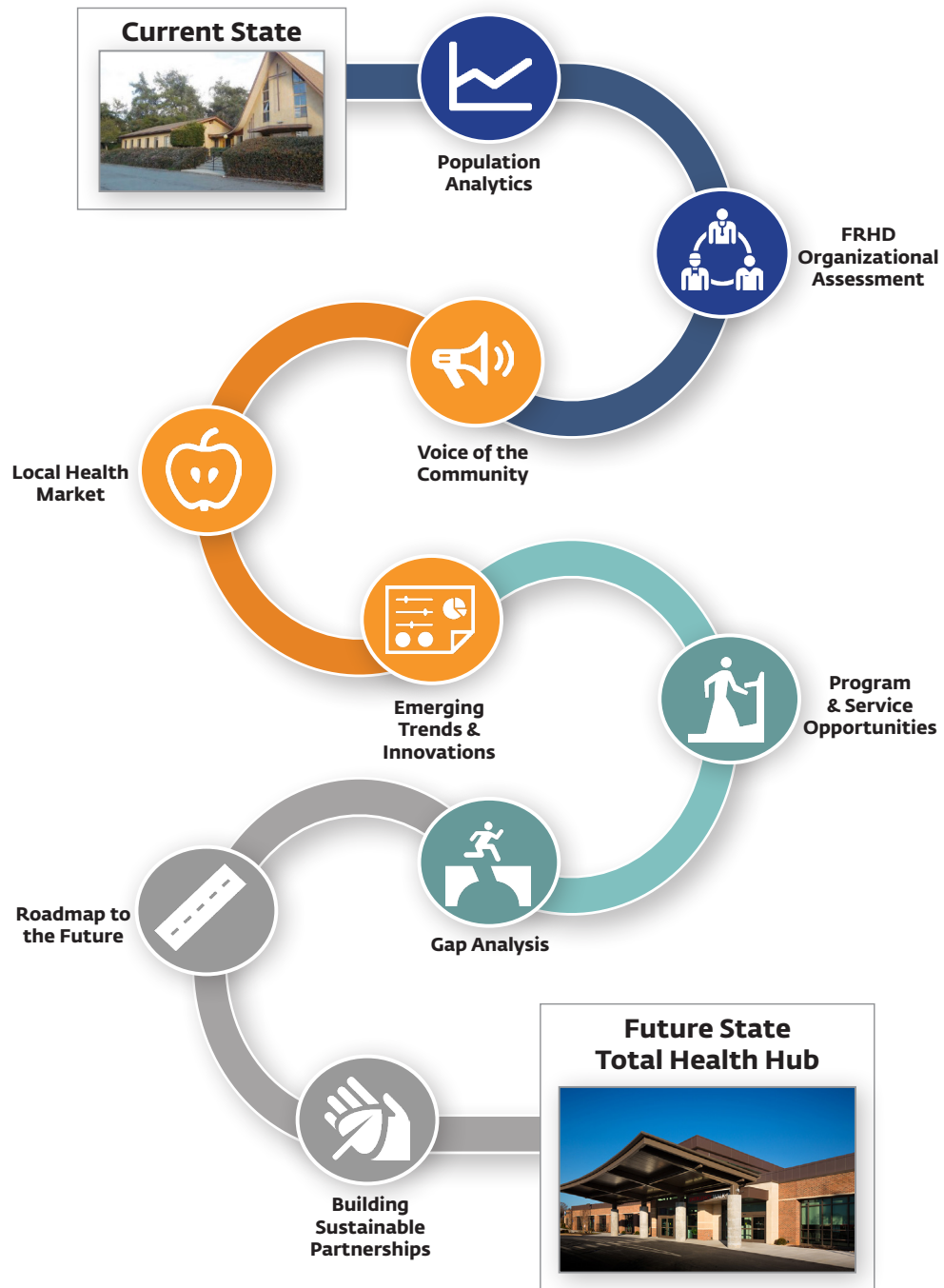






## CONCEPTUAL FRAMEWORK APPROACH

Catalyst is prepared to initiate this project by December 11, 2019, as indicated in your RFIP. We have developed a conceptual framework to efficiently and effectively accomplish your project objectives over a 12- to 16-week timeframe. Should Catalyst be selected as your partner, we will work with you to customize our work plan to match your organizational culture and resource availability.





## POPULATION ANALYTICS

The 2016 Community Health Needs Assessments (CHNA) conducted by the Kaiser Foundation Hospital San Diego, Hospital Association of San Diego and Imperial Counties, and Institute for Public Health provides helpful information to understand the health needs of the county. The 2016 CHNAs that were completed by these organizations identified Behavioral/Mental Health needs as the number one health need for residents of San Diego County. Cardiovascular Disease, Obesity, and Type 2 Diabetes are significant health needs of the county's residents as well. In the 2016 CHNA, the Kaiser Foundation identified the top health drivers of the county to include (in order of priority):

1. Food insecurity and access to healthy foods
2. Access to care or services
3. Homelessness/housing issues
4. Physical activity
5. Education/knowledge
6. Cultural competency
7. Transportation
8. Insurance issues
9. Stigma
10. Poverty

*The Fallbrook Health Needs Assessment General Population* report submitted by CentraForce provides valuable information about the specific socio-behavioral characteristics of the residents of the District. Catalyst will review data from all sources to inform our analytics. Using the Fallbrook Regional Health District market, which includes Fallbrook, De Luz, Rainbow, and Bonsall, Catalyst will conduct a rigorous data analysis of your current and projected population demographics and characteristics to help inform the health and wellness needs of your District's residents.

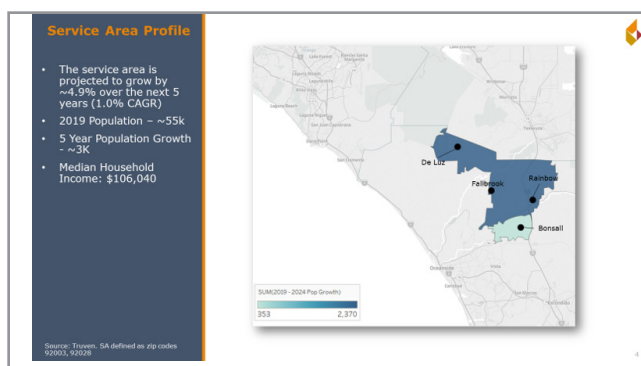
Catalyst has access to several databases, i.e., Truven, Advisory Board, and MGMA, which we will utilize to understand the District's demographic trends, disease risks, Social Determinants of Health, and lifestyles. We will layer national trends on top of local realities to inform the community needs assessment. Catalyst has developed a series of interactive dashboards to present demographic, market, utilization, and financial analyses. Dashboards enable Catalyst to run real-time scenarios to understand the impact that any single variable may have on current and future program and service needs and opportunities.



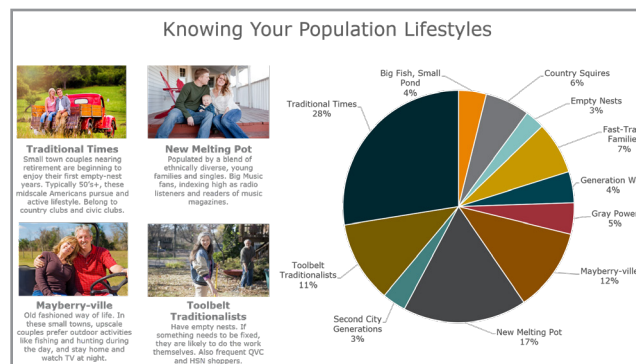


## PRELIMINARY ANALYTICAL OBSERVATIONS

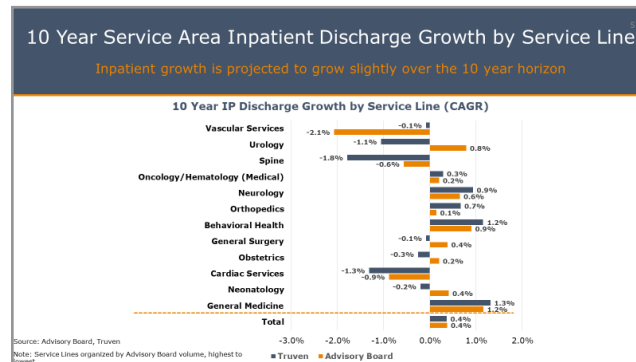
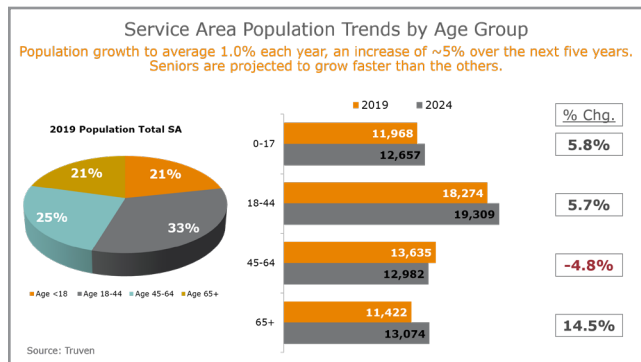
Our preliminary analysis demonstrates that the primary service area population for FRHD is expected to grow at 1.0% annually for the next five years, resulting in an increase of only 3,000 people, and a 2024 population projection of 58,000. What is notable is that the 45-64 age group is expected to shrink while the over-65 age group is expected to grow. It is likely that over the next 20 years the growth rate will be similar, and we will further analyze that during our work with you.



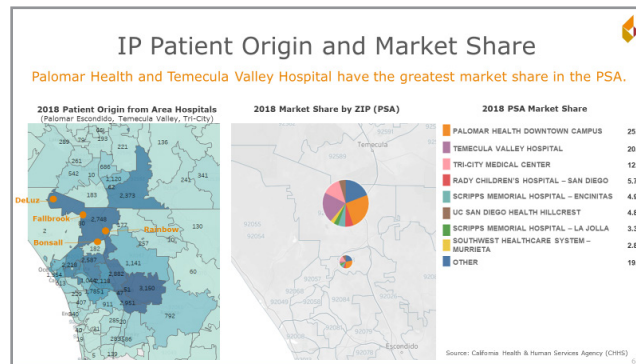
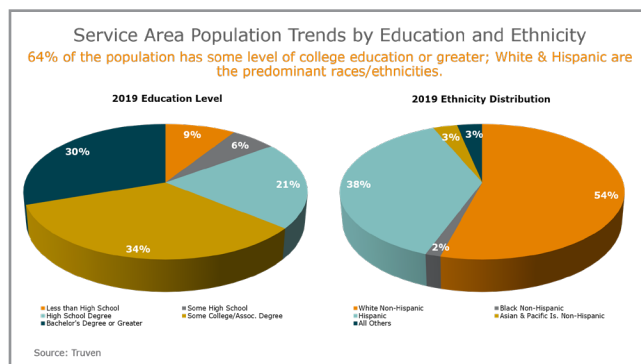
Our "lifestyle" analytics help us understand the behaviors/attitudes of segments of your population that help inform not only what the health needs are but also how they want to experience health services.



Understanding projected inpatient utilization by disease category and where District residents seek healthcare services will further inform what total health looks like for residents of Fallbrook, De Luz, Rainbow, and Bonsall. Inpatient discharges will grow at a CAGR of 0.4% over the next 10 years, with Neurology, Behavioral Health, and General Medicine projected to have the greatest growth. Palomar Health and Temecula Valley Hospital have the greatest market share of the District's inpatient admissions, at 25.8% and 20.9%, respectively.



The population is moderately educated, with 64% of the population having some level of college education or better, and Hispanics represent well over a third of the population.







## FRHD ORGANIZATIONAL ASSESSMENT

We will conduct a current state assessment of the FRHD organization and its operations as a baseline from which to move forward. At a minimum our review will include:

- Strategic plan: mission, vision, and goals
- Current programs and services
- Board of Directors' role and responsibilities
- Community communication and transparency
- Measures of success, i.e., contract performance metrics
- Organizational structure and leadership
- Key operational processes
- Finances (revenues, expenses, funding)
- Financing of the Center
- Partnerships
- Assets and physical structures
- Technologies
- Community needs assessment

We will conduct the organizational assessment through the review of information and data; interviews with Board members, operational leaders and key stakeholders; and operational observations. Our Team will identify gaps that need to be addressed to move FRHD toward its vision.

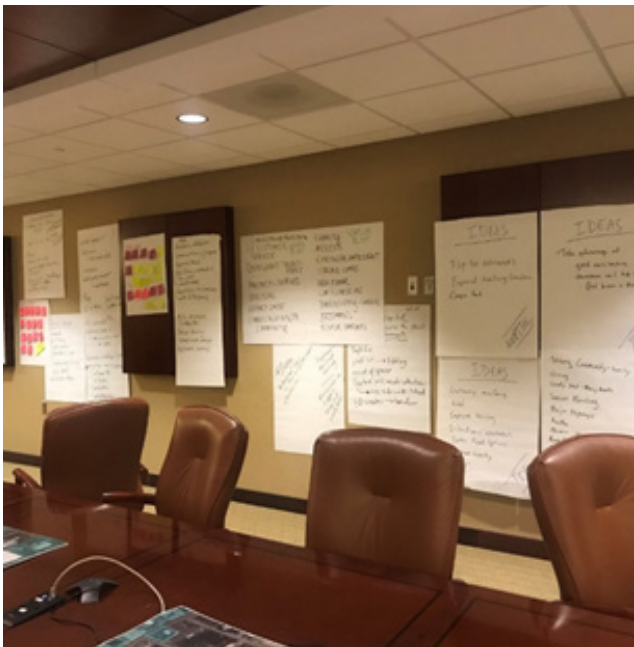
## VOICE OF THE COMMUNITY (VOC)

Voice of the Community (VOC) is the direct input from the community's residents regarding their needs to inform the current and future program opportunities for

the Community Health & Wellness Center. Our approach leverages existing information and provides for direct research to understand the community needs.

Catalyst will start with understanding the process to date to engage the community in the planning of the Community Health & Wellness Center and a review of the community feedback that has been collected. The FRHD mission of "Promoting health for the residents of Bonsall, De Luz, Fallbrook, and Rainbow" will serve as a basis to move forward. Catalyst will facilitate a discussion with the Board and operational leaders to specifically define the vision and goals, and how success will be measured.

We will collaborate with your team to develop a community outreach plan to better understand residents' attitudes, desired experience, health/wellness needs, and priorities to inform current and future program opportunities. Just as important as "what the community wants" is "how they want to experience it." Our team will conduct interviews and facilitate small group sessions (focus groups) to understand the users' expressed needs and desired experience when accessing services at the Health & Wellness Center. We will also engage the District's current and potential partners through interviews, surveys, and small group discussions to understand their resources and capabilities, perspective of health and wellness gaps in the market, and thoughts around what a mutually beneficial relationship might look like.







## LOCAL HEALTH MARKET

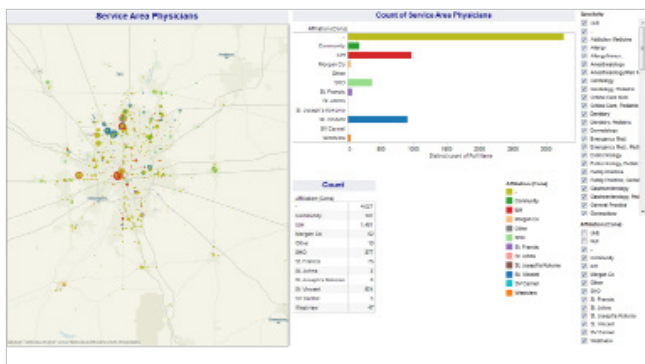
Catalyst will conduct a data-driven market analysis of the local and surrounding communities to identify resources and community assets, local trends in the market driving utilization of health and wellness services, and where FRHD has an opportunity directly, or indirectly through partnerships, to provide needed services. We will develop a portfolio of community-based organizations, educational institutions, faith-based organizations, housing and transportation agencies,

government entities, public health organizations, service organizations, and healthcare providers to understand which services are available in the District, what needs are not being met, and how FRHD Community Health & Wellness Center might fill the gaps in service offerings.

Catalyst has developed a series of dashboards that enable decision makers to understand traffic patterns, location of community resources, natural barriers in the community, and other relevant considerations that affect how residents desire to access health and wellness services.

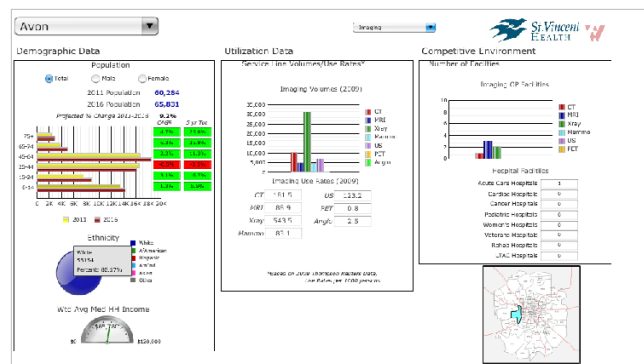
## Current Asset Inventory

Map of facilities by location and type of facility (primary care, full service hospital, outpatient, physician offices, urgent care clinics, and community-based organizations).



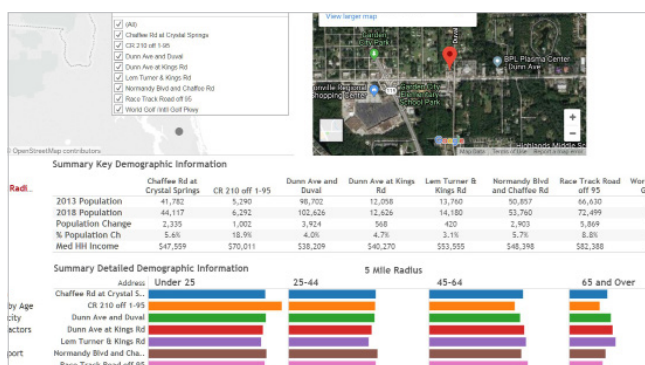
## Existing Data & Demand Assessment

Combines demographic data, utilization data, and market share data to better identify trends between demographic patterns and utilization.



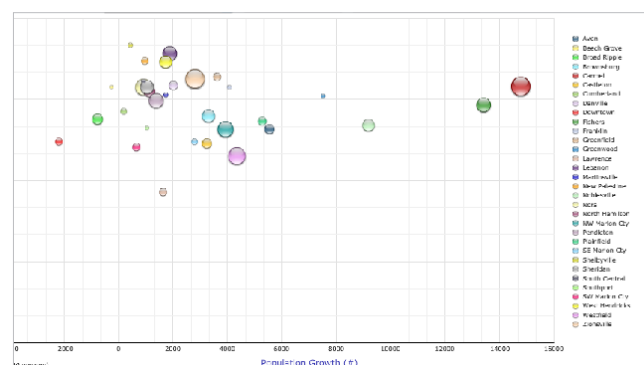
## Site Comparison Dashboard

Visually compares the demographics, volume demand, and physical location of ambulatory sites throughout the system's network. The tool assists in prioritizing and ranking facility renovations and/or clinic consolidation or relocation.



## Opportunity Identification

Consolidates demographic patterns and utilization thresholds within the market to better identify client opportunities for future market demand by analyzing existing service locations and local competitors within defined market segments.

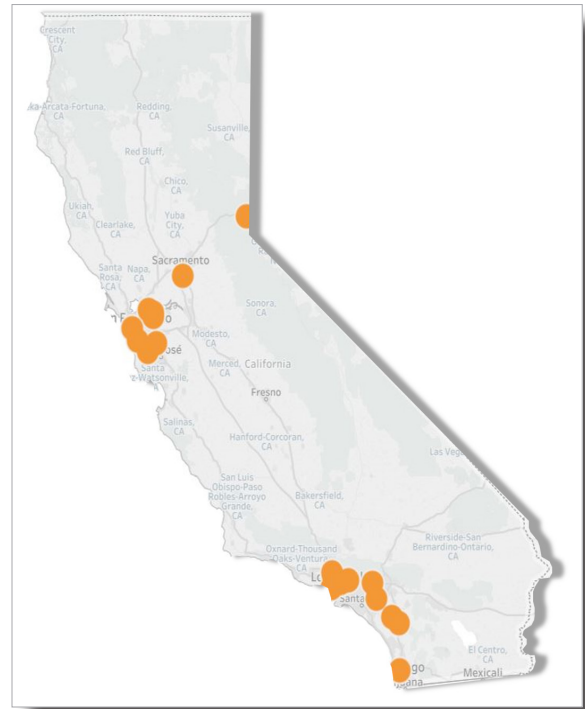




## LOCAL HEALTH MARKET

Catalyst has been serving California clients out of the San Diego office for almost two decades and has significant knowledge and many relationships within the San Diego health services market. Catalyst has completed numerous planning, improvement, and programming engagements for inpatient, ambulatory, wellness/fitness, and medical office buildings. We currently have active engagements with UC San Diego Health, Scripps, Sharp and UC Irvine. The following list reflects some of our recent clients in California:

- UHS Southwest
- Temecula Valley Hospital
- Tahoe Forest Medical Center
- Stanford University Medical Center
- UCSF Moffitt/Long Hospital
- Valley Presbyterian Medical Center
- Washington Hospital
- Contra Costa Regional Medical Center
- St. John's Healthcare
- Children's Hospital and Health Center
- John Muir Medical Center
- Kaiser South Sacramento Medical Center
- Mills Peninsula Medical Center
- Providence Holy Cross
- San Antonio Community Hospital
- Corona Regional Medical Center
- Mount Diablo Medical Center
- Scripps MD Anderson Cancer Center
- UC San Diego Moores Cancer Center
- Sharp Grossmont Infusion Center
- CHOC Children's Hospital
- Memorial Care Long Beach





## EMERGING TRENDS AND INNOVATIONS

While the future of the Affordable Care Act (ACA) is uncertain and concerns of a recession before the 2020 election loom, the following healthcare trends will continue to drive increased access to services, reduced health-related costs, and improved quality of care and outcomes:

- U.S. Census Bureau is projecting the number of uninsured to increase over the next decade.
- Emergence of new digital health technologies is changing where and how care is delivered.
- Horizontal/vertical consolidation will capture more of the market and realize economies of scale.
- Workforce shortages will demand rethinking care delivery.
- Private and government attention will change the course of the opioid epidemic.
- Educated consumers are looking for convenient access and high-value services and providers.
- Value-based payer incentives will accelerate the shift of investment toward population health programs.

A 2018 Futurescan national survey of healthcare leaders indicated that 60% of respondents have plans to increase investment in population health strategies in the next five years to address Social Determinants of Health. Innovations in technologies and consumerism will facilitate the shift of care off the inpatient campus and closer to home, work, and school. Catalyst is focused on the total health and well-being of those in the communities where we live and work. Our consultants are proactive in leading and participating in conferences and education programs to stay at the forefront of healthcare trends and innovations in care delivery. Eighty percent of our projects come from clients we have partnered with in the past. This is indicative of our success in working with various models of service delivery that incorporate a deep understanding of new care models, policy, reimbursement, payer relationships, emerging trends, innovation, technologies, customer experience, and the needs of the local community.

## Innovations Transforming Health



### Artificial Intelligence (AI)

Quick computation of vast amounts of data to look for patterns and suggest actions relate to diagnosis and treatment of disease.



### Virtual Reality (VR)

Currently being experimented with for pain management and behavioral health with other uses in the future.



### Bioelectronic Medicine

Modulate the nervous system to treat disease and injury without medicine through smart clothing application.



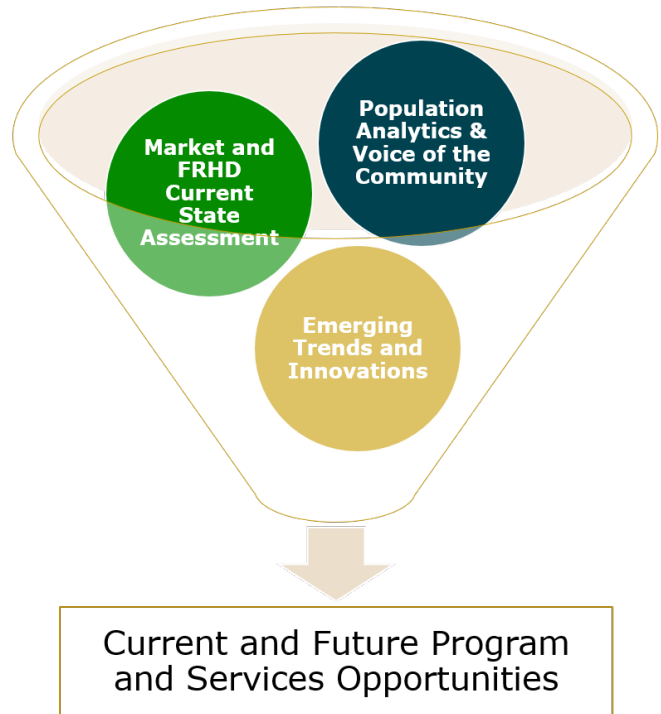
### Smart Campus

Extensive use of technologies to improve service delivery and customer experience on health campuses.



**PROGRAM AND SERVICE OPPORTUNITIES**

Catalyst will synthesize the current and future District demographic profiles, disease rates, community and partner feedback and stated needs, FRHD current programs, organization and partners, local market dynamics, and emerging trends and innovations to identify the community needs for current programs and services, as well as future program opportunities and possible revenue enhancements. We will identify where FRHD has an opportunity to create partnerships to provide the preventive health programs and services needed by the community. Through a series of review sessions with the Project Team, we will refine the list of current and future programs and services, and potential partnerships and innovations for presentation to and validation by the Board of Directors.



*EXAMPLE*

**Program and Service Criteria Assessment**

Key: ● — Meets    ◐ — Partially Meets    ○ — Does Not Meet

Programs & Services	Expressed Community Need	Gap in the Market	Align with Priority Health Needs	Partner in the Market	Consistent with Future Trends
Nutrition/Cooking	◐	◐	●	◐	○
Meditation/Stress Reduction	●	●	◐	●	◐
Adult Day Care	◐	○	○	●	●
Senior Walking Program	◐	○	●	◐	◐
Eye Program	◐	○	●	◐	◐
Diabetes Education	●	●	●	◐	●
Adolescent Exercise Class	◐	○	●	○	◐
Tutors / Study Program	◐	◐	◐	○	○
Cardiac Rehab	○	●	○	●	●
Breast Health	○	●	●	◐	○
Healthy Moms	◐	○	●	○	◐





## GAP ANALYSIS

Once the current and future program and service opportunities have been directionally approved by the Board of Directors or its designated subcommittee, Catalyst will carry out a gap analysis to identify the resources needed for implementation of the programs. Using current state as baseline, Catalyst will identify additional resources required to successfully implement the programs now and in the future. Resources are more than physical assets, such as facilities, vehicles, technologies, and people. They also include leadership, governance, knowledge/capabilities, alignment of partner goals, organizational structure, and culture. Once the gap in resources is fully defined, the next step is to understand how best to acquire what is needed.

Gap	Category	Sub-Category
Incorrect use of crisis center - people transport dementia patients to the crisis center thinking they are having a psychotic break, really it's dementia	Access	Point of Access
Disproportionate concentration of BH patients @ certain EDs	Access	Point of Access
Same day access	Access	Timely care
Follow-up appt/ wait time for appt	Access	Timely Care
Transportation	Access	Transportation
Transport from jail to shelters (fallen through)	Access	Transportation
Transporting youth in crisis from school to crisis center (won't do it)	Access	Transportation
Consistent messaging for services & resources	Communication	Consistency
Education of process/policy/capability (the WHY)	Communication	Education
Communication w/ non-Medicare patients	Communication	Targeted Audience
Time- teachers (certifications), MH First Aid, Church	Community	Advocate Engagement
Religious connection	Community	Advocate Engagement
Knowing all businesses educate employees	Community	Advocate Engagement
BH campaigns	Community	Advocate Engagement
Employers' acceptance of MH support	Community	Advocate Engagement
Community commitment to address need	Community	Advocate Engagement
Diverse organizations: culture- language, education, etc.	Community	Diversity
Standardizing intake info	Continuum of Care	Information sharing
School direction- Counselor>ED>Crisis Center	Continuum of Care	Process
Ground level collaboration (right now it is mostly among leadership)	Continuum of Care	Process
Coordination with VA	Continuum of Care	Process
Individual practitioners not incentivized to refer or coordinate with other organizations	Continuum of Care	Process
Community Care Transitions	Continuum of Care	Transition of care
Steps after Jail	Continuum of Care	Transition of care
Communication gap on release from Judge to coordinating access to care (end up in ED)	Continuum of Care	Transition of care
Facility proximity	Facility	Proximity
Need for more beds/ clinic space across facilities	Facility	Space

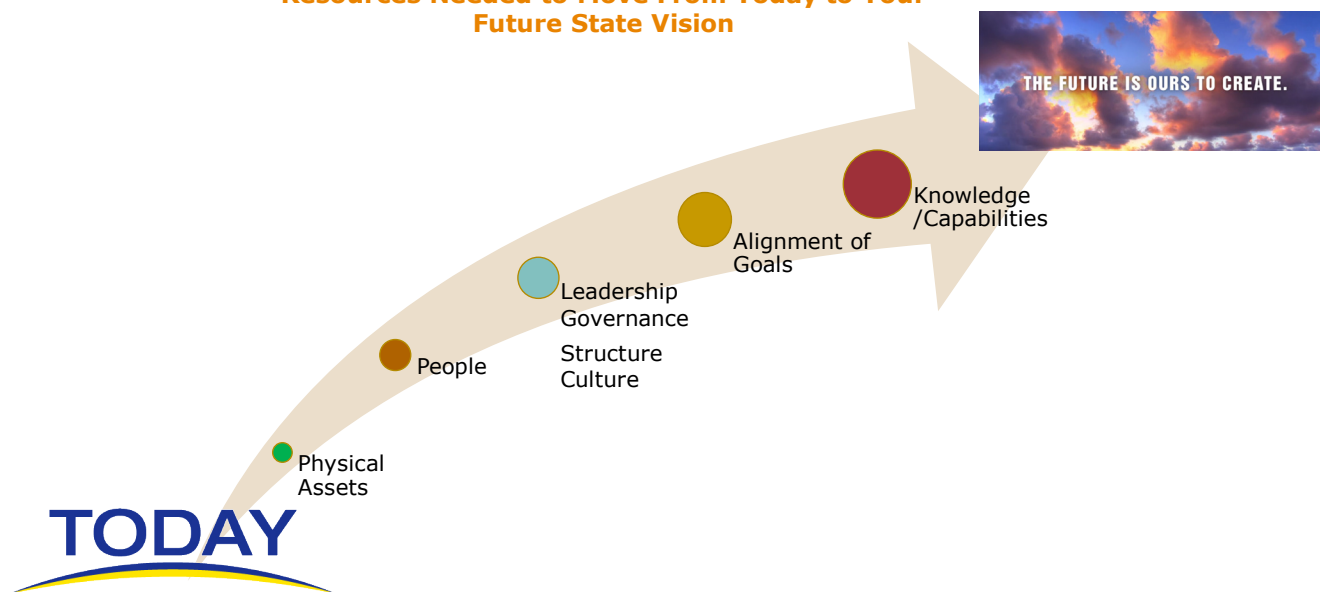
**Gaps by Category**

Over 50 gaps identified during on-site visioning session

Majority of Gaps are service and resource related:

- Services: 29%
- Resources: 19%
- Continuum of Care: 15%
- Community: 13%
- Access: 13%
- Communication: 6%
- Facility: 4%

## Resources Needed to Move From Today to Your Future State Vision





## ROADMAP TO THE FUTURE

Once the current and future program and services opportunities are validated and the resource gap identified, Catalyst will assemble a roadmap or implementation plan that will enable FRHD to transition from where you are today to where you want to be in the future. The roadmap is a defined set of interdependent tasks that are completed within a given timeframe to

achieve the desired outcome. The sequence of activities to acquire the needed resources and partnerships (which is further defined in the following section) is the foundation upon which the roadmap is created. Defined responsibilities and milestones help keep the plan on track. Specific metrics and targets will be established to measure the effectiveness of the implementation.

### Roadmap to the Future

ID #	Initiative	Description	Objective(s)	Tie to Clinic Goal(s)	Ambulatory Objective	Lead(s)	Start Date	Target Date	Progress (%)
I-1	<a href="#">X-Ray Workflow</a>	No longer schedule x-rays in Imaging Services; better communication between Ortho clinic and Imaging Svcs	Reduce wait time for patient during entire Orthopedic encounter; reduce rework on part of nurses who link orders to appt	Cycle time	Throughput	Smith	12/3/2013	1/16/2014	46%
I-2	<a href="#">Shift AM Clinic Staffing</a>	Shift CA to start 30 minutes earlier and tech to start 15 minutes earlier to enable on-time start.	78% of patients scheduled before noon; imperative to start on-time to avoid backlog and improve throughput	On-time starts	Throughput	Jones	12/3/2013	1/3/2014	83%
I-3	<a href="#">Reduce 'Pre-attending' Consults to One</a>	Consolidate med student/resident consult into one	Reduce overall length of visit	Cycle time	Throughput	Trainer	12/3/2013	12/17/2013	80%
II-1	<a href="#">Supplies in Exam Rooms</a>	Install keypad locked cabinets stocked with supplies in exam rooms	Reduce physicians having to leave exam room to search for supplies	Cycle time	Throughput	Scott	12/3/2013	2/15/2014	9%
II-2	<a href="#">ED Discharge Instructions</a>	Smooth transition of patients from ED to Ortho clinic	Improve flow of Ortho clinic	Patient Communication	Throughput	Ronanye	12/3/2013	1/4/2014	25%
III-3	<a href="#">Pre-Encounter Staff Roles &amp; Responsibilities</a>	Determine future state responsibilities of staff members by role for pre-encounter	Maximize efficiency of the clinic; ensure accountability for all tasks	Cycle time; Patient Communication	Throughput	Chander	12/3/2013	3/1/2014	0%
III-1	<a href="#">Scheduling Algorithms</a>	Develop algorithms for how to get the right patient to the right provider	Reduce scheduling errors and wasted visits	Patient Communication	Access	Jones	12/3/2013	3/1/2014	8%
III-3	<a href="#">Streamline discharge process</a>	Determine roles, responsibilities and protocols for how patients are discharged based on need.	Reduce waiting for discharge	Cycle time	Throughput	Smith	12/17/2013	3/31/2014	10%
III-4	<a href="#">Template modifications</a>	Tailor templates to specific physicians	Optimize use of provider time	Cycle time; On-time starts	Throughput, Access	Smith	3/1/2014	7/1/2014	4%
III-5	<a href="#">Clinic phone access</a>	Improve access to Orthopedic Clinic via phone	Improved patient satisfaction and quality of care	Patient Communication	Patient Satisfaction	Trainer	TBD	TBD	TBD

Understanding the capital investment and financial viability of the Community Health & Wellness Center is needed to make an informed decision regarding the mix of proposed programs and services. Key assumptions will be developed with the Project Team to plug into the financial model. Assumptions might include partner funding, various types of resident fee structures, revenue for special programs, facility costs, and operational costs. Using the model and assumption scenarios, our team will run the feasibility model and provide key financial metrics to assess the long-term financial viability of the Community Health & Wellness Center given the proposed programming.

### Financial Feasibility Dashboard





## BUILDING SUSTAINABLE PARTNERSHIPS

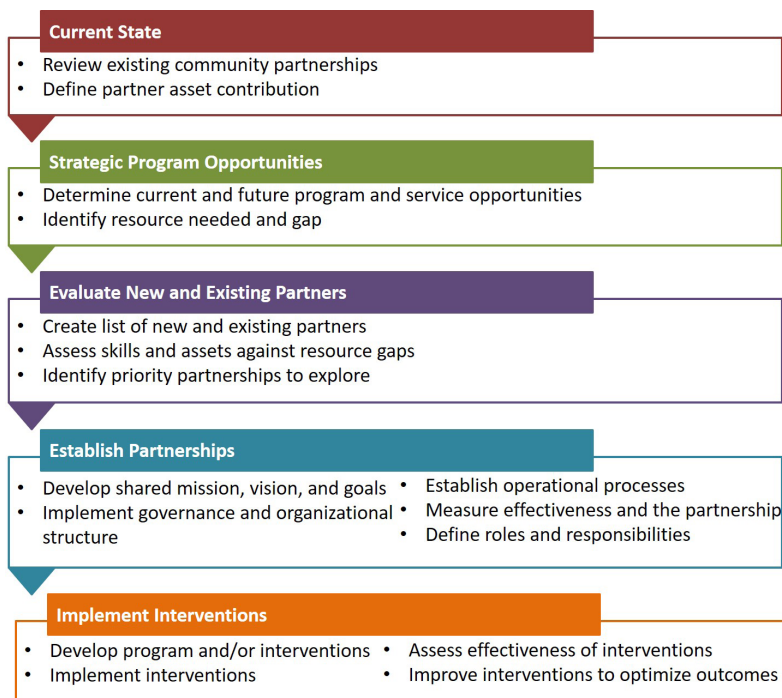
Improving the total health and wellness of a community requires addressing the drivers of illness and disease or the Social Determinants of Health. Many organizations in the community, such as community-based organizations, educational institutions, faith-based organizations, housing and transportation agencies, government entities, public health organizations, service organizations, and healthcare providers, have ongoing efforts to address related issues and provide support to at-risk populations. FRHD has recognized the value of community partnerships to advance its mission to promote health to residents of the District and has existing relationships with Boys & Girls Clubs of North County, Fallbrook Citizens Crime Prevention Committee, Fallbrook Family Health Center, Fallbrook Food Pantry, Fallbrook Senior Center, Fallbrook Smiles Project, Foundation for Senior Care, Healthy Adventures, Jeremiahs Ranch, Live Oak Park Coalition, Mental Health Systems-North Inland Community Prevention Program, Michelle's Place, Palomar Family Counseling, Reins, Trauma Intervention Program of San Diego (TIP), and UCSD Eye Mobil for Children.

Challenges and barriers, such as lack of funding, lack of organizational structure, different cultures, disparate data sources, inexperienced leadership, and lack of consensus

on programs/objectives, must be addressed to create sustainable value-added relationships to meet the needs of the community. While challenges will always exist when creating partnerships, the opportunity to align CBOs around common goals and objectives, reduce the duplication of efforts, break down silos, enhance the effectiveness of internal assets and resources, and increase the total health and well-being of the community making it a worthwhile endeavor.

It is important to engage existing and potential partners early and often in the strategic planning process for the Community Health & Wellness Center. As key community stakeholders, these organizations provide insights into the needs of the community and where gaps in programs and resources exist. Interviews, surveys, and focus groups provide the forum to learn more about the mission, culture, leadership and assets of these key stakeholders and potential partners to inform the current state of local community programming. As the current and future program and service opportunities for the Community Health & Wellness Center begin to take shape, existing and new partnerships will be evaluated against the assets, i.e., people, physical structures, knowledge, funding, recognition, they can bring to the table to facilitate the successful implementation of the program. The process to create effective community partnerships is depicted in the following graphic.

## CREATING EFFECTIVE CBO PARTNERSHIPS





## High-Level Timeline

The suggested timeline below depicts the sequence of key activities. Should Catalyst be selected as your partner, we will work with you to finalize the detailed work plan and schedule of meetings.

Key Activities	Month 1	Month 2	Month 3	Month 4
Population Analytics				
FRHD Organizational Assessment				
Local Health Market				
Community Needs Assessment				
Emerging Trends and Innovations				
Program and Service Opportunities				
Gap Analysis				
Roadmap to the Future				
Building Sustainable Partnerships				Ongoing







## HOURLY RATE SCHEDULE





## Hourly Rate Schedule

The hourly rate schedule is provided below. Once the specific scope of work has been defined we will develop a fixed professional fee for your consideration. Catalyst makes every effort to effectively manage our professional fee.

Reimbursable expenses will be invoiced as incurred. Reimbursable expenses include direct consultant travel and administrative expenses without multipliers or markup and will largely depend on the confirmed number of on-site visits and the number of consultants who participate on site. Our approach provides that we consolidate our on-site work allowing us to effectively manage travel expenses. We will rely on the use of various telecommunication technologies to further minimize our travel expenses when appropriate.

LEVEL	HOURLY RATE
Director/Project Executive	\$400
Clinical Expert	\$350
Senior Strategist/Project Manager	\$300
Associate Strategist	\$220
Strategist	\$180
Senior Healthcare Analyst	\$300
Associate Healthcare Analyst	\$220
Logistics Manager	\$140



# APPENDIX





## Catalyst Project Experience, 2017-Present

Project Name	Project Type	Start Date	End Date
Allina Health System			
United Hospital Cardiology	Operations	October 2017	June 2018
Ascension Health System			
Raydient HC Strat Alli Plan & Prog	Strategy	March 2017	July 2017
Providence Hospital (DC) SFMP	Strategy	November 2017	March 2018
Crittenton Hospital SFMP	Strategy	May 2018	March 2019
Sacred Heart Pensa SFMP Update MOB	Planning	May 2018	January 2019
SVH Project Sophia	Strategy	June 2018	March 2019
St Joseph Tawas SFMP	Strategy	August 2018	July 2019
St Mary's Standish CommHosp SFMP	Strategy	August 2018	December 2018
SE WI - Franklin Campus SFMP	Strategy	September 2018	June 2019
Presence St Mary & Eliza MC SFMP	Strategy	October 2018	June 2019
Presence St Francis SFMP	Strategy	October 2018	June 2019
St Alexius MC SFMP	Strategy	October 2018	June 2019
Presence Mercy MC - Aur SFMP	Strategy	October 2018	June 2019
Presence St Joseph Elg SFMP	Strategy	October 2018	June 2019
Adventist Glen Oaks Hospital SFMP	Strategy	October 2018	June 2019
Alexian Brothers Rehab SFMP	Strategy	October 2018	June 2019
Presence Holy Family MC SFMP	Strategy	October 2018	June 2019
Presence St Joseph MC Joliet SFMP	Strategy	October 2018	June 2019
Adventist Hinsdale Hosp SFMP	Strategy	October 2018	June 2019
Adventist La Grange Mem SFMP	Strategy	October 2018	June 2019
Adventist Bolingbrook Hosp SFMP	Strategy	October 2018	June 2019
Presence St Mary's Kankakee SFMP	Strategy	October 2018	June 2019
Presence Resurrection MC SFMP	Strategy	October 2018	June 2019
Presence St Joseph Chicago SFMP	Strategy	October 2018	June 2019
Seton Children's Hosp Mkt Anly&Prog	Strategy	December 2018	ongoing
St Joseph MC Joliet Comm Vis Sessio	Planning	April 2019	June 2019
St Thomas Rutherford 2019 Plan Upda	Planning	June 2019	ongoing
Bay Medical Sacred Heart SFMP	Strategy	July 2019	ongoing
Atrium Health			
CHS - Blue Ridge SFMP	Strategy	February 2017	December 2017
BayCare Health System			
South Florida Baptist SFMP	Strategy	February 2017	November 2017
Mease Countryside Supply Log Morton	Operations	May 2018	October 2018
Mease Countryside OR Log Morton Pla	Operations	June 2018	August 2018





Project Name	Project Type	Start Date	End Date
<b>Beebe Healthcare</b>			
Beebe Freestanding ED Study	Operations	July 2018	March 2019
<b>Centra Health</b>			
Centra Health Ambulatory Planning	Strategy	June 2018	May 2019
Centra Health Inpatient Analysis	Strategy	September 2018	June 2019
<b>CHRISTUS Trinity Mother Frances Hospital</b>			
TMF ED Study	Strategy	February 2017	June 2017
TMF Imaging Anly and Programming	Strategy	June 2017	September 2017
Christus - St Michael Health Plng	Planning	December 2018	ongoing
<b>Dale Medical Center</b>			
Dale Medical Center MP, Program	Strategy	October 2017	February 2018
<b>Englewood Hospital &amp; Medical Center</b>			
EHMC ICU Planning Study	Strategy	February 2017	July 2017
Englewood Health OB Program	Operations	November 2018	December 2018
EHMC Inpt Bed Need 2019	Strategy	July 2019	September 2019
<b>Eskenazi Health</b>			
Eskenazi Health MP and Ops Study	Operations	May 2018	June 2019
<b>ft3 Architecture Landscape Interior</b>			
Grace Hospital Simulation 2017	Operations	April 2017	July 2017
<b>Glens Falls Hospital</b>			
GFH Phys Integration Eff Study	Operations	November 2017	April 2018
Glens Falls SFMP Add Svc Feb 2018	Planning	February 2018	July 2018
<b>GPM Municipal Advisors LLC</b>			
PFA MPTC Acquisition Due Diligence	Strategy	December 2017	March 2018
<b>Intermountain Healthcare</b>			
Intermountain SFMP	Strategy	March 2017	October 2017
<b>Margret R. Pardee Memorial Hospital</b>			
Henderson Cnty Pardee SFMP	Strategy	July 2017	February 2018
Pardee SFMP Add Svc	Strategy	January 2018	August 2018



Project Name	Project Type	Start Date	End Date
<b>Mount Nittany Medical Center</b>			
Mount Nittany Med Ctr SFMP 2018	Strategy	March 2018	July 2018
<b>Novant Health</b>			
Novant Medical Park SFMP	Strategy	July 2017	June 2018
Novant Winston-Salem Surgical Svcs	Strategy	February 2018	October 2018
Novant Forsyth SFMP Update 2018	Strategy	August 2018	March 2019
Novant Forsyth Women's Svc OB-NICU	Strategy	August 2018	March 2019
Novant Presbyterian Main SFMP PHI	Strategy	November 2018	March 2019
Novant Rowan MC SFMP PH I & II	Strategy	December 2018	April 2019
NHFMC SFMP 2019 Planning Add Svc	Planning	January 2019	March 2019
<b>Pike Development Company</b>			
Univ of Rochester MOB Planning	Planning	May 2018	October 2018
<b>Providence Hospital</b>			
Brighton Ctr for Recovery Rendering	Strategy	July 2017	September 2017
<b>Saint Thomas Health Services</b>			
St Thomas Rutherford SFMP	Strategy	February 2017	July 2017
<b>Saint Thomas Midtown</b>			
St Thomas Midtown SFMP Update 2018	Strategy	January 2018	August 2019
<b>Sanford Medical Center</b>			
Roger Maris Cancer Ctr SFMP	Operations	June 2019	ongoing
<b>Schumacher Clinical Partners</b>			
Reynolds Memorial Hospital FCA	Planning	November 2017	May 2018
<b>SCL Health</b>			
SCL St Joseph Inpt L&D Ops Study	Operations	October 2017	January 2019
SCL St Vincent Healthcare SFMP	Operations	February 2018	June 2018
SCL Platte Valley MC SFMP	Operations	February 2018	July 2018
SCL Health SFMP Capital Proj Matrix	Operations	March 2018	May 2018
SCL Saint Joseph NICU/Nursery Plan	Planning	May 2018	July 2018
SCL Programming Services West Hosp	Operations	November 2018	May 2019
<b>Scotland Health Care System</b>			
Scotland HealthEDSurgCSROIStudy	Operations	June 2017	June 2018
Scotland HCS Surg PMO Implem Svcs	Operations	March 2018	March 2018
<b>Via Christi/ Sedgwick County Finance</b>			
Via Christi Behavioral Health Assmt	Strategy	April 2019	July 2019

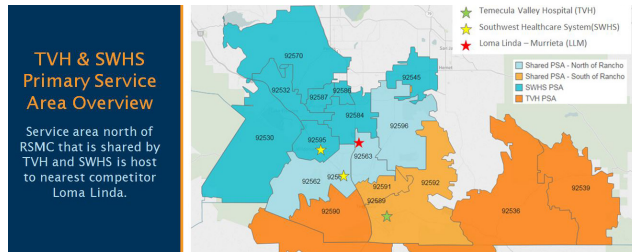


Project Name	Project Type	Start Date	End Date
Smith Moore Leatherwood LLP			
Blue Ridge CON Appeal Support	Strategy	November 2017	June 2018
South County Health			
South County Ops, ASC, Inpt Cap Anl	Strategy	June 2019	August 2019
South County SFMP	Strategy	June 2019	ongoing
Spectrum Health			
Spectrum ICU QTA Analysis Hrly	Strategy	April 2018	June 2018
2019 Spectrum Health Inpt Data	Strategy	April 2019	ongoing
St. Agnes Healthcare			
St. Agnes SFMP	Strategy	February 2017	September 2017
St. Luke's Hospital			
St Luke's SFMP FCA	Strategy	May 2018	September 2018
St. Mary's of Michigan			
St Mary's Update Town Centre SFMP	Strategy	June 2018	August 2018
St. Vincent Healthcare			
St Vincent MC SFMP Add Svc 2018	Strategy	January 2018	June 2018
Tampa General Hospital			
Tampa General SFMP	Strategy	October 2018	May 2019
Tampa General Periop Ops Study	Operations	January 2019	August 2019
Tampa General ROI	Strategy	September 2019	ongoing
Texoma Medical Center			
Texoma MC Anc Supp Svd Sp Planning	Planning	January 2018	May 2018
Universal Health Services			
UHS N Nevada MC Market Analysis	Strategy	February 2017	November 2017
UHS Valley Hospital MC Mkt Analysis	Strategy	March 2017	May 2018
UHS Desert Springs Hosp Mkt Analysis	Strategy	March 2017	June 2017
Spring Valley Hosp Mkt Analysis	Strategy	March 2017	December 2017
Temecula Valley Hosp Mkt Assess	Strategy	March 2017	February 2018
Valley Hosp Med Ctr Anc/Sup Plan	Planning	May 2018	June 2018
Texoma Med Ctr Anc/Supp Planning	Planning	June 2018	August 2018
George Wash Univ Anc & Sup Bench	Planning	July 2018	August 2019
UHCS Summerville Planning Study	Planning	September 2017	March 2018
Via Christi Health			
Via Christi St Teresa SFMP	Strategy	May 2018	April 2019
Wake Forest Baptist Medical Center			
Wake Forest Baptist Med CtrED Study	Operations	May 2017	February 2018
Yellowstone Surgery Center			
Yellowstone Surgery Ctr Conc Pl	Operations	June 2016	ongoing





**UNIVERSAL HEALTH SERVICES SOUTHWEST FACILITY PLANNING**  
WILDOMAR AND MURRIETA, CA



**SCOPE:** Facility and Architectural Conditions Assessment / Market Analysis Needs Assessment / Facility Planning / Programming / Capital Cost Analysis

**DESCRIPTION:** Catalyst was engaged by Universal Health Services (UHS), a for-profit national provider, to develop a strategic master plan that would position the System to capture organic and strategic growth opportunities in the market. As part of UHS, Southwest Healthcare System (SWHS) is a hospital system in Southern California that is made up of two hospitals - Rancho Springs Medical Center (RSMC) and inland Valley Medical Center (IVMC). The medical facilities are located four miles apart from one another in a high-growth area and risked losing market share to newer facilities. The challenge was capturing growth in aging facilities while competitors had newly built facilities. Both campuses contained wood construction, lack of vertical growth capacity, site constraints and aging infrastructure, limiting their ability to accommodate desired growth.

To further complicate matters, UHS also owns a third, newer hospital within the service area, which was later added to the study's scope for appropriate service line distribution and to understand the impact of potential market share cannibalization among the campuses.

Catalyst developed an exhaustive analysis of patient origin and created scenarios modeling various service line redistribution strategies. The team considered necessary investments in the campuses, market opportunities and the system's financial capabilities, relative to the capital costs associated with each of the options. Total Master Planning Options ranged from \$52.8 million to \$383.2 million. Catalyst analyzed the costs associated with facility projects needed at a baseline to continue running the facilities at their current conditions compared to project costs with growth projections that could be avoided by selecting one of the replacement facility options. This allowed the team to provide leadership with a comprehensive analysis of the financial and strategic implications of selecting one of the consolidation scenarios.

**MILLER CHILDREN'S HOSPITAL\* PEDIATRIC MEDICAL VILLAGE**  
FUNCTIONAL & SPACE PROGRAMMING, LONG BEACH, CA



**SCOPE:** Project Vision and Objectives / Stakeholder Engagement / Customer Experience / Needs Assessment / Programming / Operating Parameters / Adjacencies / Space Program / High Level Capital Costs

**DESCRIPTION:** Miller Children's Hospital (MCH) is a not-for-profit, pediatric teaching hospital that treats more than 8,000 children each year. The vision is that the PVM will be an integrated healthcare destination where the patient always comes first. MCH's goal for the future delivery of ambulatory care services is to provide a single, convenient location for the majority of specialty ambulatory clinics and high-volume outpatient diagnostic and treatment services. This integrated approach is characterized by a high degree of collaboration and communication among healthcare professionals who care for and treat the whole-person.

MCH leadership met with clinical leaders and community members to develop the vision for the PMV. Our team's effort consisted of physician and staff interviews and tours, data collection and analysis, and development of planning and operational assumptions. Volume forecasting and resulting space needs were also determined. Draft functional and space programs were developed for each functional area within the PMV, which were reviewed by key stakeholders during two rounds of programming meetings. Stakeholders included both parents and children who accessed services at MCH. Final deliverables included:

- Utilization and space projections for a 10-year horizon;
- Inter- and intra-service operating assumptions optimizing the patient/family experience;
- Identification of patient-family amenities and support functions; and,
- Functional and space programs for all medical village occupants.

\*Completed by Debbie Jacobs at previous firm.



**CENTRA GRETNA MEDICAL CENTER  
WELLNESS PROGRAM**  
GRETNA, VA



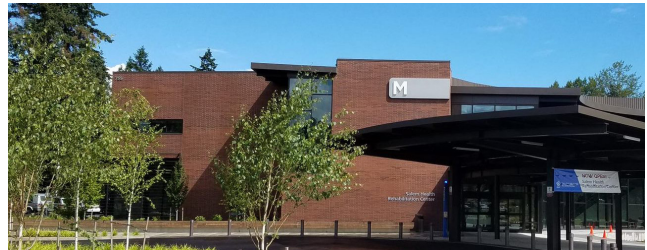
**SCOPE:** Needs Assessment / Programming / Planning / Design / Construction Services

**DESCRIPTION:** Our team was commissioned by Centra Health to plan, design, and construct a new freestanding Ambulatory Care Center, which included a Wellness Program. The goals of the project were to provide accessible and affordable care, to respond to community needs, and to build trust between providers and the community. The Wellness component offers a unique way to provide and facilitate the delivery of patient care by adopting the medical home model where disease management and wellness program integration are a top priority.

The Wellness suite can be accessed from the main entrance, has convenient after-hours access, and is organized into three main areas - support, education and clinic. Support spaces include a hospitality-oriented welcoming reception and waiting area, and convenient access to public restrooms. The Education component features a resource library, a large divisible conference/multipurpose room that can accommodate up to 60 people depending on furniture configuration, a hospitality alcove and a demonstration kitchenette with video conferencing capability. The Wellness Clinic has exam/consult rooms and a massage/acupuncture room. Anticipated programs during the planning and design phase included fitness activities such as yoga classes, and educational seminars relating to the prevention and management of diseases such as diabetes.

There is a physical therapy gym that is directly adjacent. Primary care and specialty clinics (including cardiac rehab) are also conveniently housed in the facility and provide a combined count of approximately 24 Exam rooms including one designed with telemedicine connectivity. Beyond that, the facility also provides emergency, lab and imaging services. The total project resulted in a facility of 50,000 sf and project cost of \$11.8 million.

**SALEM HEALTH\*  
REHABILITATION AND FITNESS CENTER PLANNING**  
SALEM, OR



**SCOPE:** Project Vision and Objectives / Stakeholder Engagement / Customer Experience / Needs Assessment / Programming / Operating Parameters / Adjacencies / Space Program / High Level Capital Costs

**DESCRIPTION:** Salem Health intended to develop a rehabilitation and fitness center on an 8-acre site that is adjacent to the hospital's main campus to relocate and consolidate rehabilitation services and fitness center from obsolete buildings to a more appropriate location. Our team worked closely with Salem Health stakeholders to program a Center that provides a single, coordinated location to support the outpatient rehabilitation needs of the community and house the Salem Health Fitness Center, creating a new and positive environment to promote employee wellness and fitness.

To garner valuable stakeholder input, the engagement consisted of a series of meetings and conference calls with the project's Leadership Team and Programming Team, as well as day-to-day communication with key members on both teams. The intent was to create a healing environment where customers are empowered to improve their quality of life by maximizing their functional abilities at home, work and in the community. The processes, equipment and design features of the Center are to provide an excellent patient experience characterized by high quality care and adequate space to accommodate all programmed services. To optimize the utilization of space and foster interdisciplinary collaboration, the Center incorporated shared multifunctional areas wherever appropriate.

Phase I of the engagement consisted of interviews, tours, meetings, and conference calls to define the Center's vision and objectives, scope of services, and guiding principles. Phase II focused on developing and refining the functional and space program with rehabilitation clinical and front-line staff, as well as representatives from Salem Health's Employee Fitness Center. The key outcome of this iterative process was a functional and space program for the Center that aligns with the projected needs and utilization levels of its customers. The program for the Center resulted in a facility of 31,965 sf and project cost of \$12.8 million.

\*Completed by Debbie Jacobs at previous firm.



**ASCENSION VIA CHRISTI AND SEDGWICK COUNTY  
COMMUNITY NEEDS ASSESSMENT**  
WICHITA, KS



**SCOPE:** Project Vision and Objectives/ Needs Assessment / Facility Planning / Programming / High Level Capital Costs

**DESCRIPTION:** Faced with limited resources to effectively address behavioral health issues within the community, a regional health system and the county government engaged Catalyst to develop a strategy to better care for these individuals.

Catalyst implemented a two-phase approach to evaluating behavioral health needs within the community. During Phase 1 we looked at current and future community needs and interviewed stakeholders to define gaps in care. Interviews were conducted with a variety of coalition members including a regional healthcare system, community health centers, a substance abuse center, the sheriff's office, a school district, and organizations that serve the homeless population. Catalyst also looked at case studies for how communities around the country tackled behavioral health treatment. Following the data-collection stage, we presented our baseline findings and held an onsite "visioning session" with representatives from involved organizations to develop patient profiles and walk through various behavioral health profiles created by Catalyst to better understand how each individual would seek help and receive treatment within the community. This group session helped shape the overall strategic direction for behavioral health in Wichita.

Phase 2 involved Catalyst developing an à la carte facility plan that the team could roll out over several years. In the near term, we suggested right-sizing existing facilities and incorporating behavioral health services within the existing primary and urgent care infrastructure. Longer-term, we suggested moving toward a community and comprehensive facility model of co-located resources.

**VIA CHRISTI HEALTH ST. TERESA  
HEALTH VILLAGE VISIONING**  
WICHITA, KS



**SCOPE:** Project Vision and Objectives / Stakeholder Engagement / Needs Assessment / Programming / Customer Experience / Renderings / Site Planning

**DESCRIPTION:** To address possible community growth, Via Christi Health St. Teresa engaged Catalyst to create a long-term plan for a medical village around the existing hospital. This small community hospital is located on the border of a suburban and rural community. The hospital was created with the expectation that the city would grow near the location, but city planning initiatives took development to other areas. A long-range plan for a new highway near the site would encourage development, but this highway likely would not be built for 10 years.

Catalyst created concepts for maximizing the hospital's existing assets and expanding the campus into a medical, retail, and housing community. The team considered urban development plans and demographic profiles to highlight services that were appropriate for the hospital's patients and for consumers. A conceptual rendering of the site was created to depict the future campus vision, continuum of care partnerships and complementary healthcare services, high-level facilities programming, adjacencies, and any opportunities to grow volumes and enhance patient access to care.

The team held a visioning session with STH leaders and conducted a series of meetings with local city planners and engineers to paint a holistic picture of the potential growth opportunities on the site and a vision for how non-medical growth would support STH's mission. Catalyst collected STH and market specific data to identify future demand for medical and non-medical services on the campus. Using this information, the team in concert with STH leadership developed priorities, produced four options, and developed a focused scope of facility responses that incorporated medical, retail, and residential growth.

The hospital selected a hybrid option that placed the hospital in an integrated community and brought together retail, business, outdoor recreation, and healthcare spaces in traditional and non-traditional forms. This concept was unique from traditional health villages in that it was far more integrated with the community.





**Debbie Jacobs**  
Director, West Region  
Catalyst, a Haskell Company  
630.745.9769





October 8, 2019

Ms. Rachel Mason  
Executive Director  
Fallbrook Regional Health District  
138 S Brandon Road  
Fallbrook, CA 92028

RE: Request for Introductory Proposal for Strategic Consulting Services for Development of a  
Community Health & Wellness Center

Dear Rachel,

We are pleased to present this introductory proposal to provide strategic consulting services for the development of a community health & wellness center. This proposal has 5 components:

1. Understanding of the Assignment
2. Description of Services and Deliverables
3. Fees, Expense Reimbursement and Payment Terms
4. Timeline
5. Staffing and Experience

#### **1. UNDERSTANDING OF THE ASSIGNMENT**

Fallbrook Regional Health District (collectively, "FRHD") is exploring the concept of developing a vibrant Community Health & Wellness Center where people of all ages, backgrounds and socio-economic statuses can engage in healthy behaviors, form meaningful connections, and be well for their entire health span. This center would be an innovative hub for preventive health & wellbeing programs and services that will positively impact the majority of the 60,000 people in the North County communities.

Your goal is to meet FRHD's mission of "Promoting health for the residents of Bonsall, De Luz, Fallbrook and Rainbow," while simultaneously evolving from your "present state" to this exciting new campus.

It is our goal to provide you with insight and guidance on how to optimize the market potential for your future campus while aligning with your communities' needs and to identify future opportunities based on emerging technologies.

FRHD is requesting a detailed proposal from Cusimano & Associates that outlines strategic consulting services that will transform your 4.5-acre property into a "once-in-a-generation project."



Part of this assignment is to evaluate the services, partnerships, programs and values that are currently present in your community that include but are not limited to:

- Community Partnerships
- Counseling
- Current & Emerging Trends
- Emotional Balance
- Energy Medicine
- Food Pantry
- Health Contract Holders (Grantees)
- Health Fairs
- Holistic Petcare
- Innovative Health, Wellness & Wellbeing
- Military Support
- Nutrition
- Optimization of Campus Potential
- Oriental Medicine
- Physical Health and Wellness Programs
- Positively Impacting all Members of your Community
- Provision of Basic Needs
- Provision of Intergenerational Programming
- Senior Services
- The Consideration of all Ages, Backgrounds & Socio-Economic Status'
- The Enhancement of Local and Surrounding Services
- The Formation of Meaningful Connections
- Therapeutic Treatments

We will also review, evaluate and consider revenue enhancing products and services that will complement the overall programming and services that FRHD could provide. Some of these could include:

- 24/7 On-Line Monitoring
- Active & Healthy Lifestyle Programming
- Afterschool Programs
- Center Mapping Tours
- Children's Health and Wellness
- Classroom Pods
- Community Outreach
- Comprehensive Fitness Center
- Comprehensive Virtual Services
- Customized Cooking Classes
- Emphasis on Freshness, Organic Healthfulness, and Unique Presentations
- Group and Individual Physical Training
- Group Hiking
- Health Campus Tours
- Health Information Kiosks
- Healthy Grocery
- Injury Prevention & Recovery
- Interactive Virtual Games
- Logo/Gift Shop
- Meal Planning and Preparation Services for the Community
- Mind Agility Assessments
- Multi-Dimensional Class Offerings
- Office Space with Reception Services
- Ongoing Coaching
- Outreach Educational and Physical Fitness for Local Schools
- Overall FRHD Brand Enhancement
- Partner Research Labs for Development of Innovative Products
- Physical Assessment Center
- Psychological Counseling
- Separate Kitchen Facility/Classroom to serve as a Culinary Institute
- Socialization Skills Training
- Spiritual Focus/Meditation Area
- Split Home Counseling Services
- Sports League Activities
- Sports Training
- State of the Art Communications Technology
- Virtual Library
- Vitamins/Natural Supplements
- Weight/Nutrition Coaching

In the following section, we propose 3 service components. Based on our industry experience, we believe each service component will introduce a better understanding leading FRHD from your "present state" to the development of your innovative and vibrant Community Health & Wellness campus concept.

## **2. DESCRIPTION OF SERVICES AND DELIVERABLES**

### **A. Facilitate an Initial Strategic Planning Session**

1. Identify your primary strategic and financial objectives for the campus
2. Establish a timeframe to accomplish these objectives
3. Format to evaluate the results
4. Risk identification that addresses risk factors, both strategic and operational
5. Decision making process
6. Identify control mechanisms for guiding the implementation
7. Setting goals, objectives and action plans
8. Create a 'purpose statement' in addition to your current mission statement

### **B. Conduct an Operational Assessment**

1. Evaluation of your current facilities, equipment, capacities, amenities and programs
2. Analyze use & fee structures, staffing, operational efficiencies, business lines & other related expense items
3. Identify and recommend options for improved operations and new programming
4. Provide an itemized list of recommendations that should improve your operations
5. Financial evaluation analyzing all billing and collection procedures
6. Review your software programs
7. Review and improve your current marketing plan to include social media
8. Recommend a sustainable staffing plan
9. Provide a plan for sustainable long-term growth with options and alternates for you to consider based on our evaluations

### **C. Provide a Feasibility Study**

1. Site evaluation that defines the primary trade area, analyzes the local submarket and evaluates municipality influences
2. Competitive facility analysis and a capability assessment that both identify existing and proposed services & programs, impact on the proposed campus, and programs desired by the community.
3. Market assessment and gap analysis using robust analytics that determine the demand for the facility, services to be offered, programs with the greatest impact, recommended price points, estimated program usage, resources, skills and innovations.
4. Program & operations plan that identifies the therapeutic, health education, wellness, and exercise programs to be offered with recommendations on how to better integrate all current and proposed programs & services. It will identify targeted program populations, evolution of preventive health, primary operational responsibilities and objectives, and a management implementation plan.
5. Facility Plan that translates the market assessment into a space program and graphically communicates the facility components in a block floor plan.
6. Marketing and Branding Approach that defines the marketing, branding budget, critical timelines, and evaluation milestones for success.
7. Financial Analysis that projects revenues and expenses for the building and equipment, programs, cash flow, break-even levels, financial assumptions, capital requirements, financing options, pricing/reimbursements, volume assumptions, ramp-up, and recurring revenue to develop a successful operating campus.
8. Master Development Schedule that provides a roadmap of all activities that are needed to complete the implementation of new programs & services and development of the campus.

During our work, it will be necessary to have access to FRHD’s files and to interview key personnel and stakeholders. After the completion of each service listed on the previous page, we will provide a full report to include a list of recommendations that will have a high likelihood of success from both a strategic and financial perspective. We will schedule a presentation to address our findings, answer any questions, and make any final edits necessary.

**3. FEES, EXPENSE REIMBURSEMENT AND PAYMENT TERMS**

We are proposing a cost not-to-exceed fee for each of the service components outlined in section 2.

- A. Initial Strategic Planning Session - \$3,800
- B. Operational Assessment - \$6,900
- C. Feasibility Study - \$7,500

We will invoice you based on our hourly rates and direct costs, not-to-exceed the above fees.

Our hourly rates are as follows:

Louis Cusimano, Principal - \$120/hour

Summer Gilbert, Business Manager - \$60/hour

Any additional overhead support will not be billed.

Not included in the fees above are the reimbursable travel expenses which we will cap at \$800 per trip.

It is our recommendation to provide these services in succession and not concurrently (see timeline below). At the completion of each service component, you will have the critical information necessary to make informed decisions and continue, pause or stop the development process.

**4. TIMELINE**

We are prepared to complete the 3 service components within 9 months. The following schedule is a preliminary timeline showing the major activities and milestones.

Months	1	2	3	4	5	6	7	8	9
Approve and Execute Initial Agreement									
Strategic Planning Session									
Review, Present and Edit Strategic Plan									
Conduct Operational Assessment									
Review, Present and Edit Operational Assessment									
Conduct Feasibility Study									
Review, Present and Edit Feasibility Study									



## **5. STAFFING AND EXPERIENCE**

This assignment will be performed primarily by two principals: Louis Cusimano and Summer Gilbert. Our credentials can be found in 'Attachment A' as part of this proposal. There will also be several others supporting this effort on an as-needed basis. The work provided from supporting overhead staff will not be billed as part of our fee.

The projects we are currently engaged in or have completed in the last 3 years, can be found in 'Attachment B' as part of this proposal.

Please let me know if you have any questions or need any additional information. We look forward to working with you to determine the feasibility of further developing this exciting, innovative & vibrant hub for preventive health and wellbeing.

Sincerely,

A handwritten signature in black ink, appearing to read 'L. Cusimano', written in a cursive style.

Louis Cusimano  
President

## Attachment A

### Louis Cusimano

**President, Cusimano & Associates**

Louis Cusimano operates Cusimano & Associates; an 18-year-old San Antonio, TX based firm that provides consulting, operational and management services in the wellness, healthcare and not-for-profit industries.

He has over 35 years of experience in the wellness, healthcare and construction industries and has personally been involved in the feasibility, business planning, programming, design, construction, financing, scheduling, opening and operational management of many successful wellness and not-for-profit facilities.

Louis has also consulted with over 80 clients in the United States and Canada regarding their wellness programs and needs. He holds a bachelor's degree from the University of Florida and is a frequent speaker on a variety of health and wellness topics.



### Summer Gilbert

**Business Manager, Cusimano & Associates**

Summer Gilbert maintains and operates normal business functions at Cusimano & Associates. She has been with the company for almost 5 years and has been dedicated to learning and growing with the wellness industry. She graduated from Texas State University with a bachelor's degree in mass communication - public relations.

Over the past 5 years, she has provided our clients with strategic planning assistance, operational assessments, feasibility studies, business plans, market assessments, management contracts, day-to-day operations, social media, web site designs, human resources, payroll, onboarding and technology innovations.



**Health and Wellness Past Client List – Louis Cusimano (blue) & Summer Gilbert (green)**

Facility Name & Location	Strategic Planning	Operational Assessment	Feasibility Study
Altru Health System, Grand Forks, ND			
AtlantiCare Life Center, Egg Harbor Township, NJ			
Bond Wellness Center, Peterborough, NH			
Bridgepoint Health, Toronto, ON			
Centre Clubs, Libertyville, IL			
Chesapeake General Hospital, Chesapeake, VA			
CHRISTUS Health, Dallas, TX			
CHRISTUS St. Michael Health System, Texarkana, TX			
Citizens Medical Center, Victoria, TX			
Colchester Regional Hospital, Truro, NS			
Credit Valley Hospital, Mississauga, ON			
Dartmouth-Hitchcock Medical Center, Lebanon, NH			
Ephraim McDowell Health Resources, Danville, KY			
Father Martins Ashley, Harve de Grace, MD			
Florida Hospital, Orlando, FL			
Floyd Medical Center, Rome, GA			
Folsom Wellness Center, Dallas, TX			
Greenville Regional Hospital, Greenville, IL			
Hunterdon Medical Center, Flemington, NJ			
Jacksonville Center for Health & Sports Medicine, Jacksonville, FL			
Lee Health, Cape Coral, FL			
Lifetime Wellness Center, Marion, VA			
Mary Greeley Medical Center, Ames, IA			
McAlester Regional Health Center, McAlester, OK			
National Museum of the United States Army, Fort Belvoir, VA			
Northeast Methodist Hospital, San Antonio, TX			
Northwest Community Wellness Center, Arlington Heights, IL			
Norwalk Hospital, Norwalk, CT			
Oconee Medical Center, Seneca, SC			
Pella Community Hospital, Pella, IA			
Princeton Community Health & Fitness Center, Princeton, WV			
Reid Health Care Services, Richmond, IN			
Returning Heroes Home, San Antonio, TX			
Robert Wood Johnson University Hospital, Hamilton, NJ			
Rochester Health Services, Rochester, NY			
Sanford Health, Bismarck, ND			
Sauk Prairie Memorial Hospital, Prairie du Sac, WI			
Sentara Health, Norfolk, VA			
South Jersey Health System, Vineland, NJ			
St. Joseph's Hospital, Hamilton, ON			
St. Mary Medical Center, Apple Valley, CA			
St. Mary's Health, Athens, GA			
Tahoe Forest Center for Health, Truckee, CA			
Texarkana College, Texarkana, TX			
TherapyPlus Wellness Centers, Guntersville, AL			
Thorek Memorial Hospital, Chicago, IL			
Titus Regional Wellness Center, Mt. Pleasant, TX			
Tri-City Wellness Center, Oceanside, CA			
University of Colorado Health & Wellness Institute, Denver, CO			
USO Warrior & Family Center, Arlington, VA			
Virtua Health, Marlton, NJ			
Wheaton Franciscan Health, Milwaukee, WI			
YMCA of Metropolitan Milwaukee, Milwaukee, WI			



**ATTACHMENT B**  
**Projects Engaged in the last 3 years:**

**Bond Wellness Center**

Over the past 3 years we have performed an operational assessment along with annual strategic planning sessions. We currently manage and operate the Bond Wellness Center for Monadnock Community Hospital in Peterborough, NH.

**CHRISTUS St. Michael**

We recently did an operational assessment for the CHRISTUS St. Michael Health & Fitness Center in Texarkana, TX. After assessing the 30-year-old facility, we developed a list of recommendations that they are currently implementing. We also evaluated the potential of adding additional group exercise space and how to reconfigure the center to accommodate more users.

**National Museum of the United States Army**

Since 2015, Cusimano & Associates has filled the role as the Owner's Representative for the Army Historical Foundation in the process of planning, constructing, and completing the 185,000 square foot National Museum of the United States Army located in Fort Belvoir, VA.

**Jacksonville Center for Health & Sports Medicine**

Recently, we conducted an operational review of their new wellness center and evaluated the integration of clinical programming and wellness services. We made recommendations based on how to continue their success now that they have been open for several months.

**Mary Greeley Medical Center**

In 2018, we conducted a feasibility study to determine the success of an employee only wellness center vs. a community wellness center to be located in Ames, IA. We assessed a few different potential sites for the project including an entire floor in the existing hospital.

**Hampton Center for Health & Fitness**

Cusimano & Associates owned, operated and maintained Hampton Center for Health & Fitness for almost 5 years. We transitioned the Center from previous hospital ownership and branding to its own small business then transitioned the Center to the new/current Hampton Roads YMCA in Hampton, VA.

**Marshall Medical Centers**

Located in Guntersville, AL, the TherapyPlus Wellness Centers span across the cities of Guntersville and Boaz. We conducted an operational assessment for both of their Wellness Centers and provided a list of recommendations to help stabilize operations as well as financials. We also provided an extensive market assessment to show each of the Centers their potential market share in separate but close communities.

**Methodist Dallas**

We conducted an operational assessment for the existing Folsom Fitness Center, which was then followed by a feasibility study to develop the center into a much larger scale facility to accommodate the community surrounding the Methodist Dallas Health System in south west Dallas, TX.





# Community Health & Wellness Center

Fallbrook Regional Health District

Request for Introductory Proposal

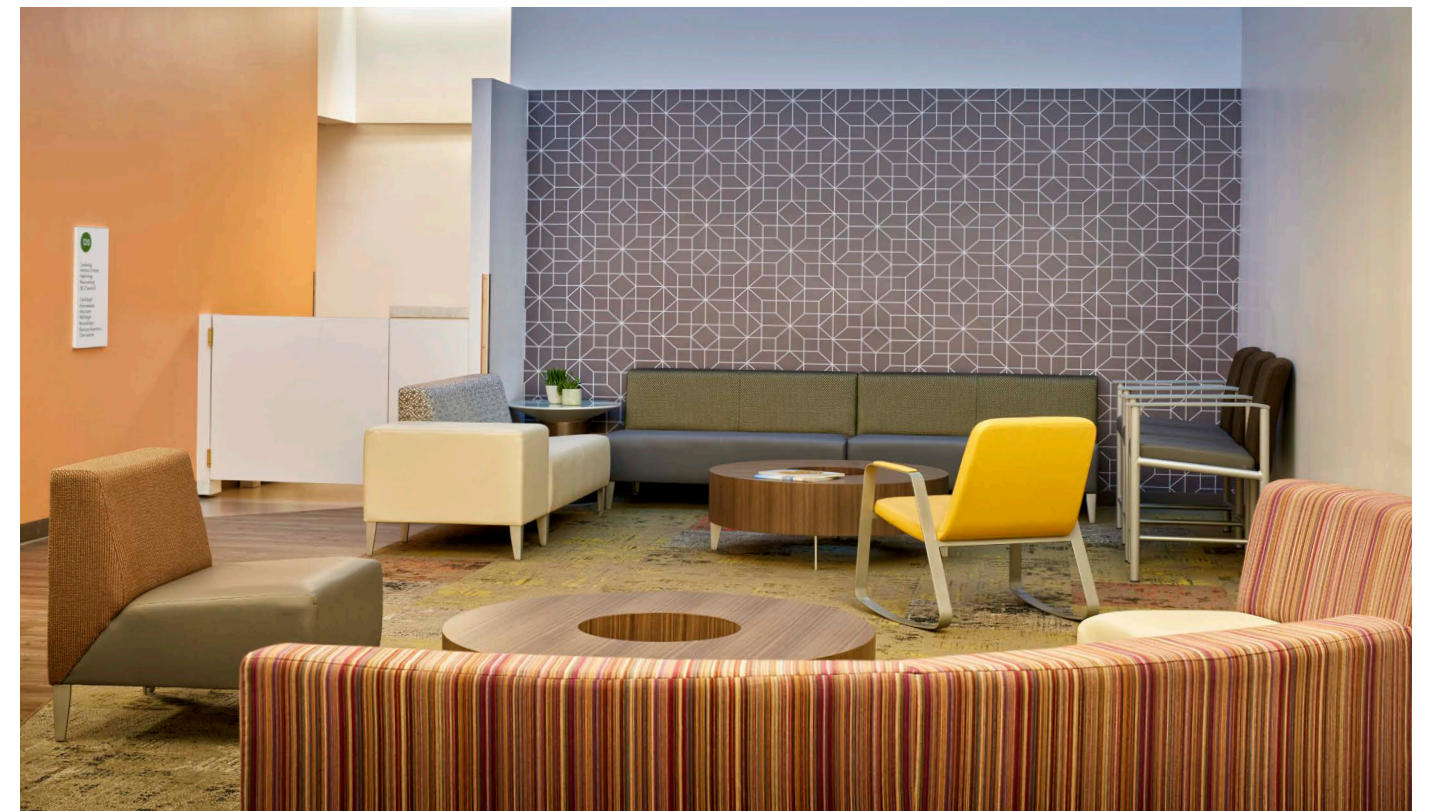
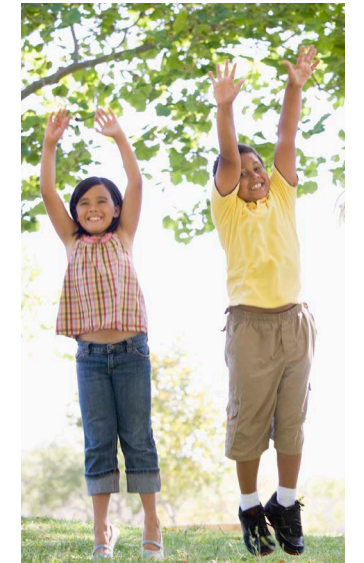
October 9, 2019







Don Knabe Wellness Center, Rancho Los Amigos Rehabilitation Center  
Downey, California



**03**  
*cover letter*

**19**  
*relevant projects*

**51**  
*rate schedule*

**05**  
*wellness design strategy*

**43**  
*key team members*





UC San Francisco ACC5  
San Francisco, California

# TAYLOR design

Attention: Rachel Mason, Executive Director  
Fallbrook Regional Health District  
138 S Brandon Road, Fallbrook, CA 92028  
RMason@FallbrookHealth.org

RFIP for Strategic Consulting Services  
for Development of a Community Health  
& Wellness Center  
10/09/2019

Dear Selection Committee,

On Behalf of Taylor Design, we are pleased to participate in this RFIP for the strategic consulting services for development of a Community Health and Wellness Center. This first step of the larger project, will be as much about the process and appropriate engagement as the results that will yield from the right approach. At Taylor Design we embrace the idea of co-learning to avoid designing based on assumptions but rather by listening and applying our knowledge to the appropriate strategic plan. This process fosters innovation while solving the right challenges, as we work together to gain consensus from stakeholders and the community.

*"I've learned that people will forget what you said, people will forget what you did, but people will never forget how you made them feel." Maya Angelou*

This Project will be focused on understanding the opportunities, current, and evolving health and wellness needs of the Fallbrook, Bonsall, De Luz, and Rainbow communities. Within this proposal response we will be demonstrating a wide range of expertise, experience, and qualifications. We will also be highlighting the unique approach we have to research and community/stakeholder collaboration to uncover the right solutions. We will share many of our methods for gaining information both from an analytical process, but also through a human centered design focus. The Fallbrook Health District is in an important position to set the direction and provide a framework for the communities health care continuum.

We are excited about taking this journey and partnering with the Fallbrook Health District to lead the team and navigate the tough decisions. We have enjoyed a long standing relationship with Fallbrook Regional Health District, and look forward to continuing it.

Thank you for this opportunity and we look forward to next steps.

Joe Lowe, AIA, LEED AP, DBIA Assoc. , Lean Six Sigma  
Designated Project & Technical Lead  
jlowe@wearetaylor.com  
619.398.0440

taylor design + fallbrook health district  
wellness design strategy

# DESIGN THAT EMPOWERS PEOPLE

74 | Employees



Architectural Design | Interior Design | Design Strategy






4 Offices | 40 Years in Business!!




100% Employee Owned



## WHO WE ARE FIRM OVERVIEW

We discover, develop, and design solutions for the built environment. Since 1979 Taylor Design has embraced projects that contribute to positive experiences for people and the creation of greater possibilities, including modest facility remodels, new construction, and infrastructure improvements, to large-scale hospital replacements and master planning.

We believe that our work makes a difference – be it helping people navigate a healthcare setting, supporting new ways for research and education to happen, or developing new ways of thinking about doing things better with our clients.

Taylor Design fosters an environment of continuous learning and knowledge-sharing across our offices in Irvine, San Francisco, Sacramento, and San Diego for our 80+ employees - from CAD/Revit staff, planners, project managers, and strategists to principals. Our resources include specialized practice leaders that support the strategy-based design process and ability to integrate user-based research into built environment projects.

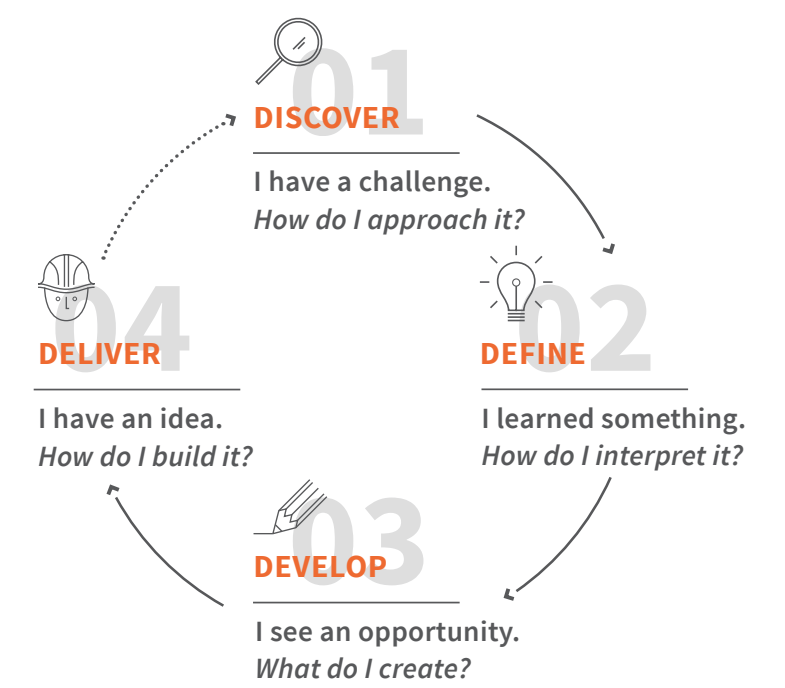
At Taylor Design, we continually strive to increase our intellectual capital and think innovatively with your team to realize your goals and drive your organization forward. For us, asking “why?” as much as “what?” is critical in planning and designing for project delivery.

Working face to face with the Fallbrook Health District we use our unique Strategy Based Design Approach to gather needed information, then synthesizing the results to uncover the road-map to success for the Community Health & Wellness Center.

## OUR PROCESS STRATEGY-BASED DESIGN

Strategy-based design is an iterative approach that leverages the best of lean methodology, human-centered design, and design thinking. In practice, we begin every creative challenge with a Discover phase, where we identify the problem, prepare and conduct research, and gather inspiration from a wide range of sources. From here, we enter a Define phase, where we tell stories, find patterns and frame early opportunities for design. Once articulated, we brainstorm possibilities and Develop our ideas, conceptually and concretely. Finally, once we’re aligned on a way forward, we Deliver by refining our work through to completion.

Our three practice areas – Architectural Design, Interior Design, and Design Strategy – are united in their use of design as both a point of view, and a shared process.





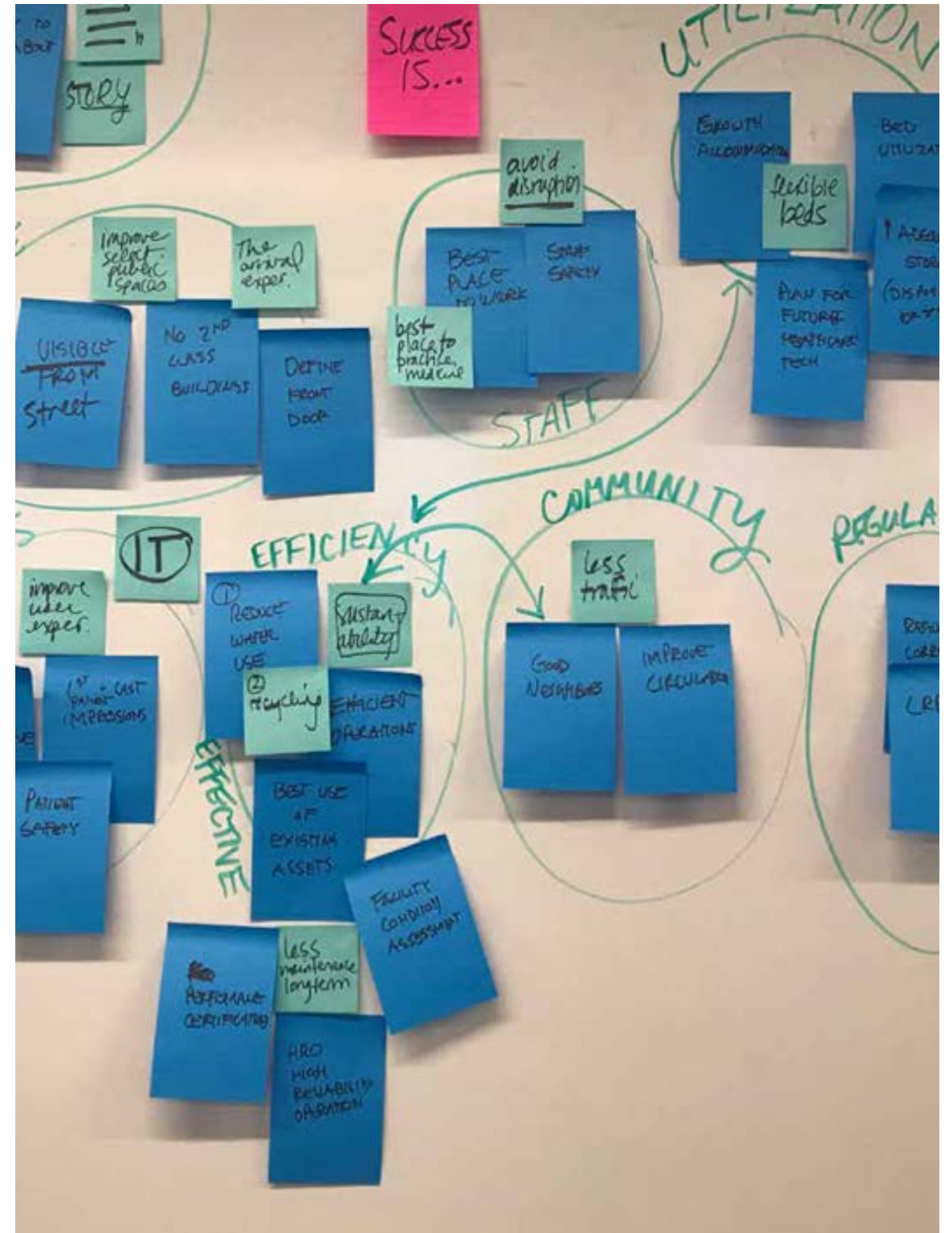
**Working with Fallbrook Regional Health District we'll practice a human-centered design process throughout.**

As a strategy-based architectural team, invested in meaningful user outcomes, our goal is to align our master planning efforts to FRHD's strategic goals and look at our challenge holistically. As a collaborative multi-disciplinary team, we will push each other to think big and capture the essence of the overall campus for staff, patients and visitors.

The entire master plan team will meet regularly by conference call and in-person for interactive workshops. The pages that follow tell this story of participatory design, from early discovery through opportunity definition, design development and delivery.

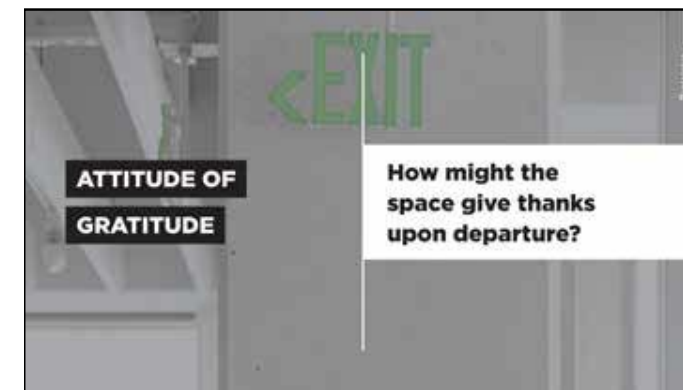
**We'll meet as a team to kick-off the project and define success.**

To start the project in alignment, we propose starting the project right by meeting as an extended team to engage in a series of high-energy team-building exercises and define success. We'll identify True North Indicators, project influencers, drivers and "sacred cows." Expectations will be clearly set from day one.



**We'll study the community of Fallbrook and present provocations at the Visioning meeting.**

Before diving straight into designing the master plan right, we'll make space for discovery to determine that we're designing the right thing. This includes a deep-dive into the Fallbrook region, as well as client needs, wishes and constraints. We'll cast the net wide in order to encompass the experiential component of design, in addition to the technical, functional, logistical, operational and structural - from "What if" provocations down to nuts-and-bolts.



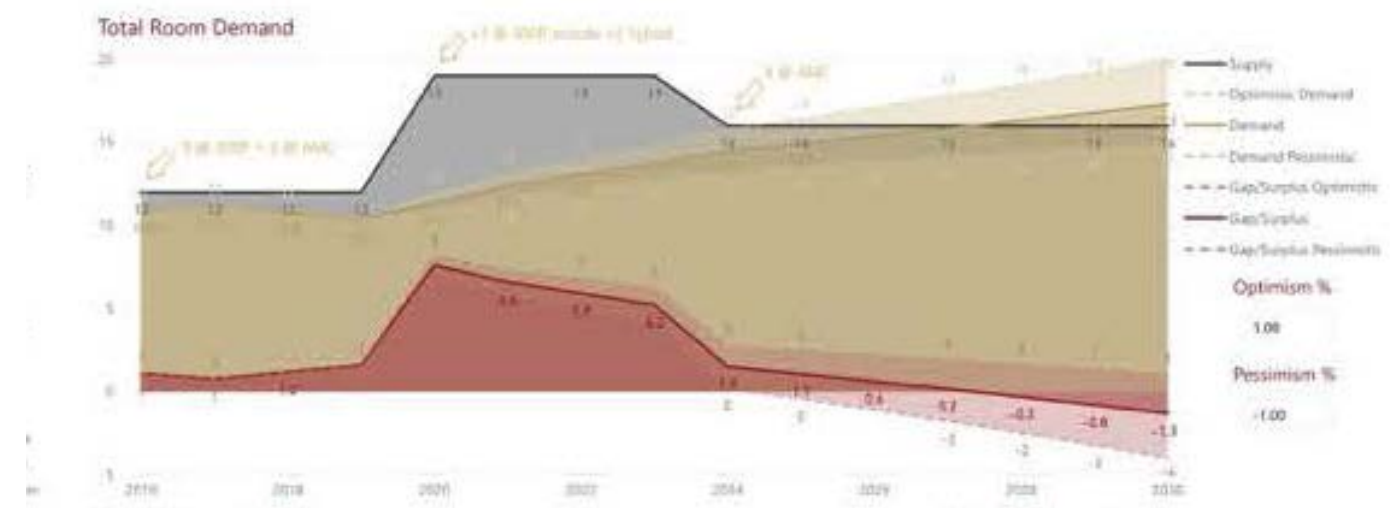
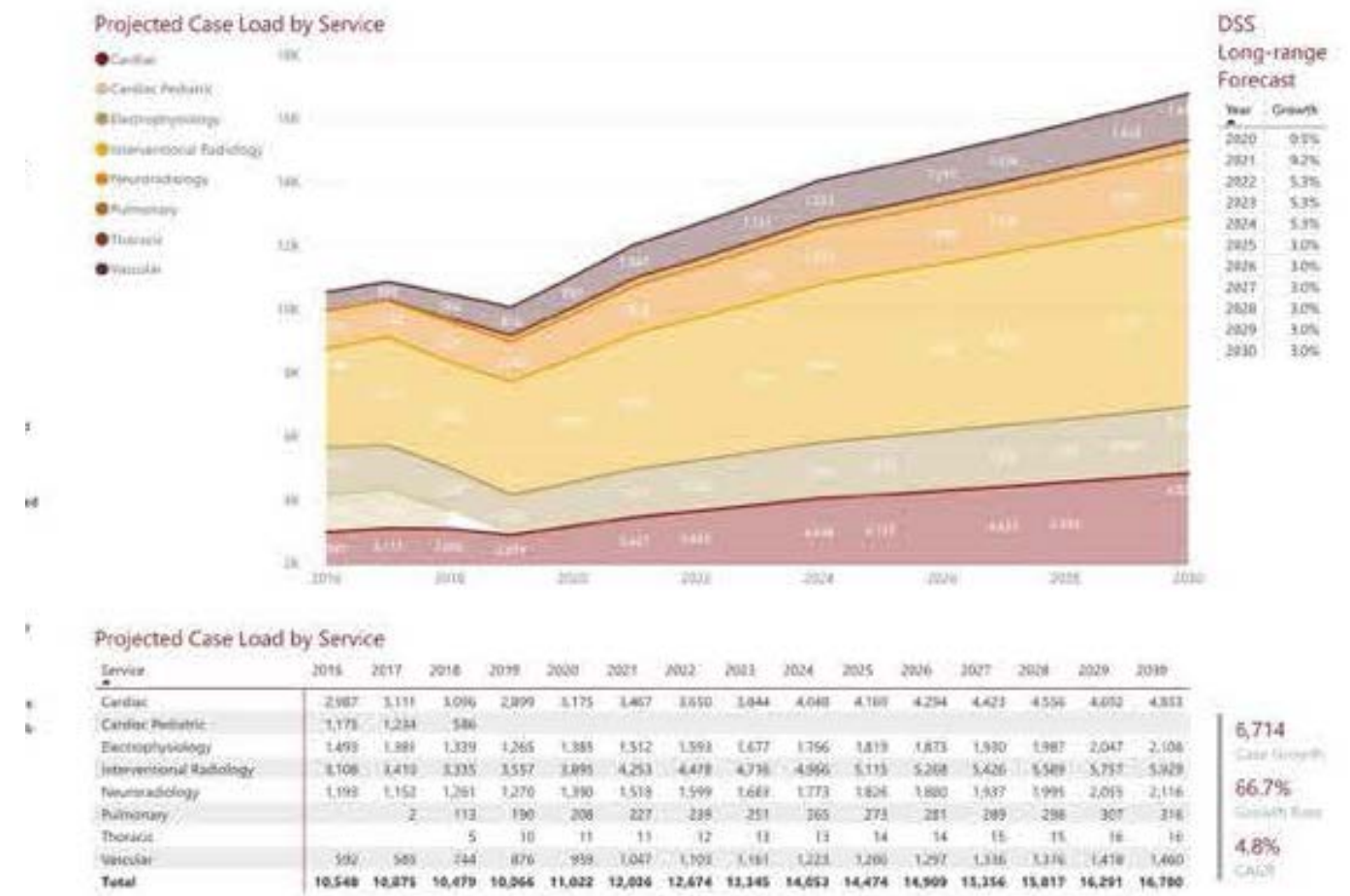


Taylor Design would research current data bases and use the information obtained from our collaborative assessment of FRHD’s current organizational structure, programs and services to assist in identifying various programs and services for the broader community surrounding the city of Fallbrook. Utilizing various forms of information/data/statistics from current sources for:

- Population composition, and density centers,
- Locations for various existing and planned Hospitals and Medical Centers near Fallbrook, and their focus/specialty,
- Local diversity of industries surrounding Fallbrook and the various Occupations (Drs., etc.),
- Estimated median household income; est. per capita income; house and condo values; mean price of various housing types; median gross rent; home sales;
- Cost of living index compared to US average of 100; percent living in poverty which is also broken down into racial comparisons,
- Understanding the number of and needs of single-mother families.

Timelines will be established based on the research for the various above listed groups of statistical data to correlate with FRHD’s future goals. This correlation will then provide FRHD with a future outlook to the various design options.

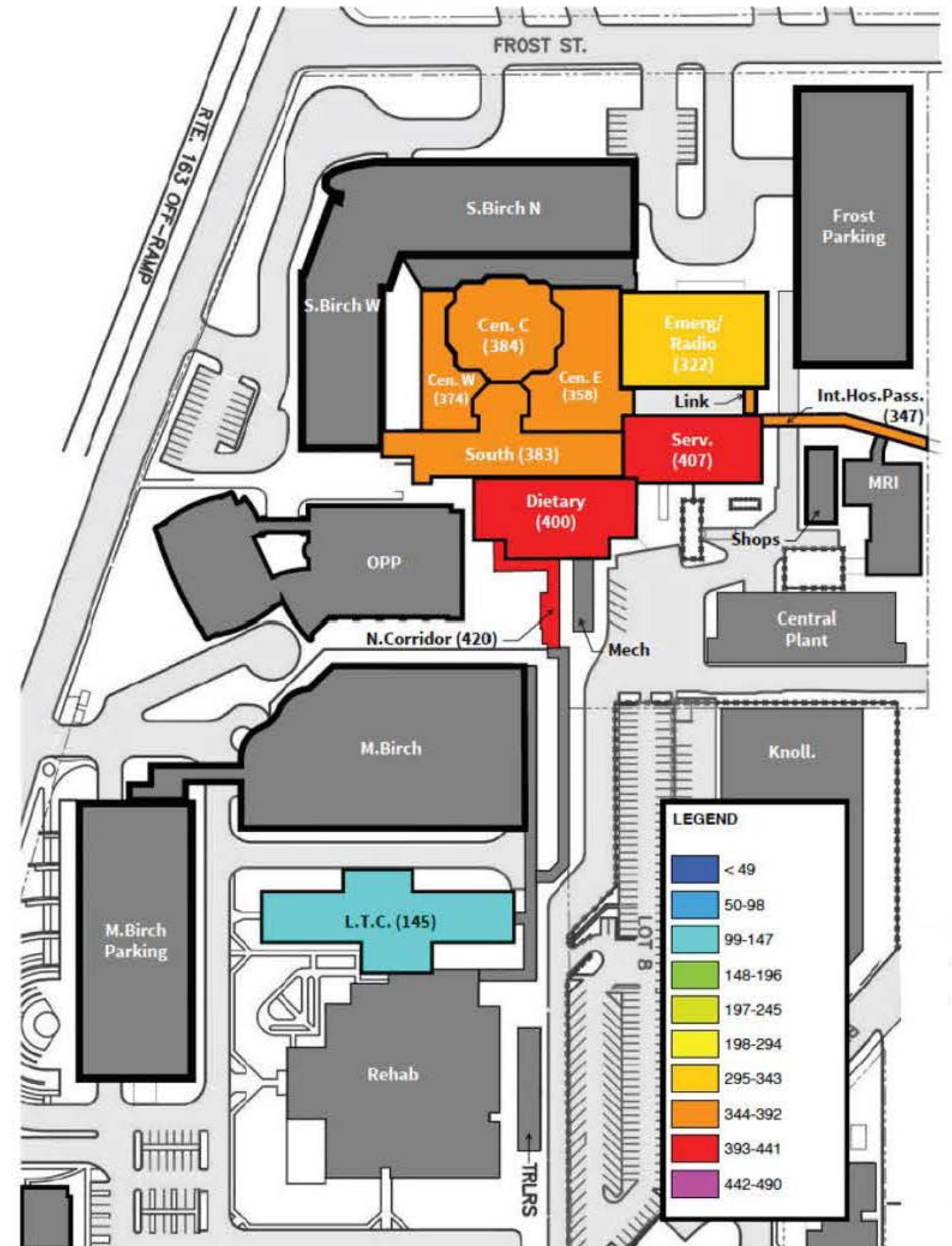
## Interventional Platform Study





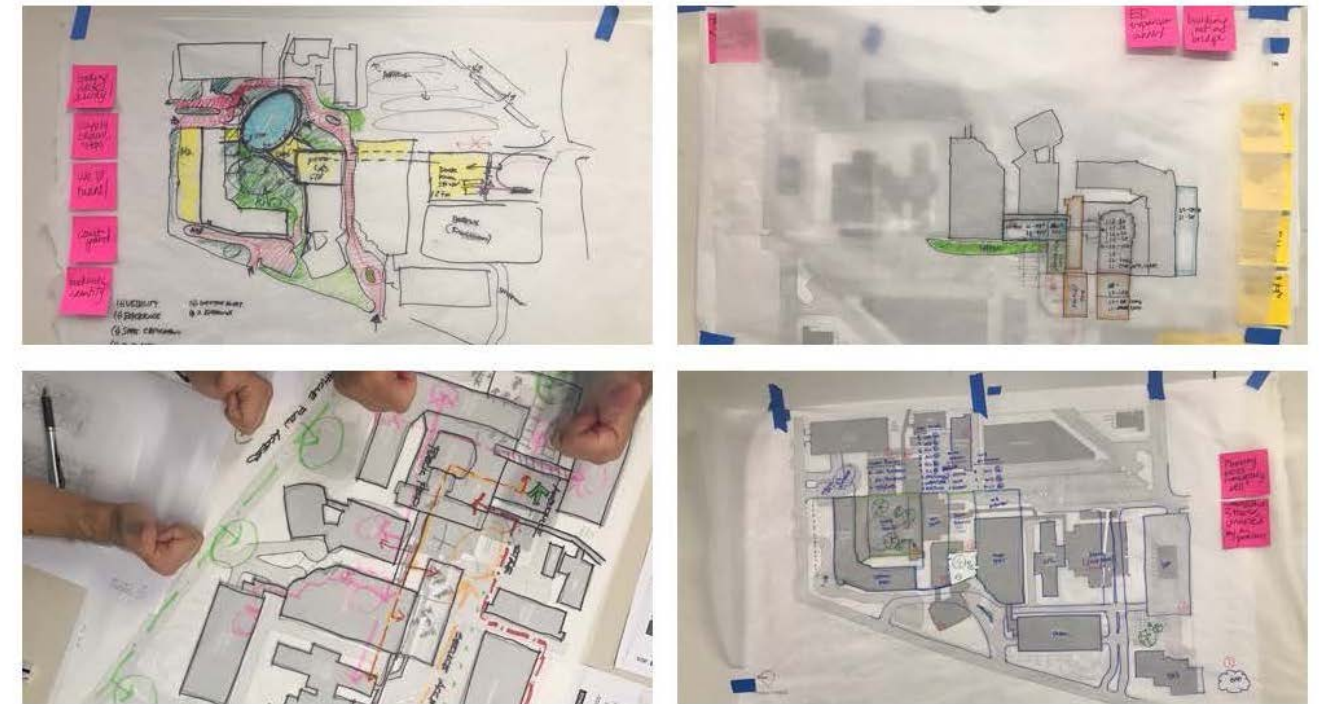
## Process Sample from Sharp Memorial

Similar to what we did with Sharp Healthcare and the Master Planning Process for Sharp Memorial, we would do an initial assessment. The diagram on the right is color coded based on surveys and workshops to identify what services/buildings were working well, and which ones needed to be improved. We also looked at gaps and analyzed where the highest needs (demand) was with the current programs/departments. By analyzing the services from a global level we had better perspective on where to focus our attentions. Our strategy would be to host a similar workshop to compare what we are seeing in the analytics to the perceptions of the stakeholders.

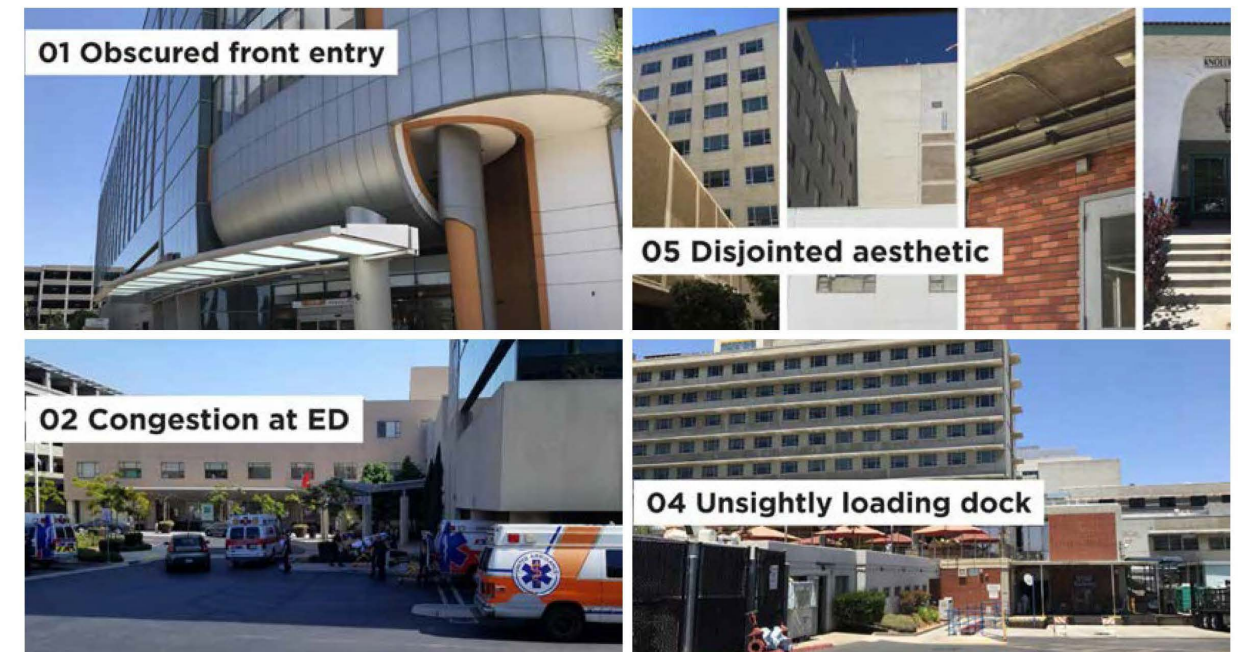


**We'll facilitate a dynamic design charrette and generate new ideas.**

Having sufficiently discovered and defined the design challenge at hand, we will step into design development, starting with a day-long interactive workshop, in which we break into small multi-disciplinary teams, each given a kit of supplies and assigned a unique challenge to solve (to push innovative thinking and stretch the imagination). At the end of the charrette, each team will share-out their creations with the larger group. Lively discussion ensues.



Process Sample from Sharp Memorial



relevant projects





WHAT DOES  
DOES

HAPPY  
PLACE

COMMUNITY

# HUNTINGTON BEACH

MEAN  
YOU?

AWESOME  
SURF CITY  
U.S.A.

A relaxing  
lifestyle

CHILL  
VIBE

Home for  
23 years

happy

DOON BEACH  
FUN

Family  
& Fun  
in the Sun

BEAUTIFUL  
LIFE  
WITH MY  
WIFE!

ESCAPE

happy

Family  
Friends  
& Fun  
in the Sun

BEAUTIFUL  
LIFE  
WITH MY  
WIFE!

HEALTHY  
RELAXATION  
& FRIENDSHIP

A beautiful  
place

happy

BEAUTIFUL  
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A beautiful  
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happy





# programming and planning

## *kaiser permanente huntington beach medical office building*

For Kaiser Huntington Beach, we wanted to understand the community character before endeavoring to design its medical office building. So we devised a fun, participatory event using a blank canvas and colorful markers directly on the beach, where surfers and families had the opportunity to engage with us firsthand. We asked them what Huntington Beach meant to them, and they answered. In droves. The canvas event gave us a literal picture of the community and an inspiring starting point for design development.

### HIGHLIGHTS INCLUDE

43,000 SF

Design Strategy

Master Planning

Programming

What we learned from our many opportunities to involve the community, is that they embrace being part of the process and for the Community Health and Wellness Center, we will implement similar community engagement strategies.





# Master Plan

*sharp metropolitan medical campus*





After successfully completing the Sharp Metropolitan Master Plan in March 2019, Taylor Design partnered with HDR and McCarthy Building Company to propose on the next phase of work; an overhaul of the entire campus. Having recently won the job, the team will work on 12 buildings on the Sharp Metropolitan campus.

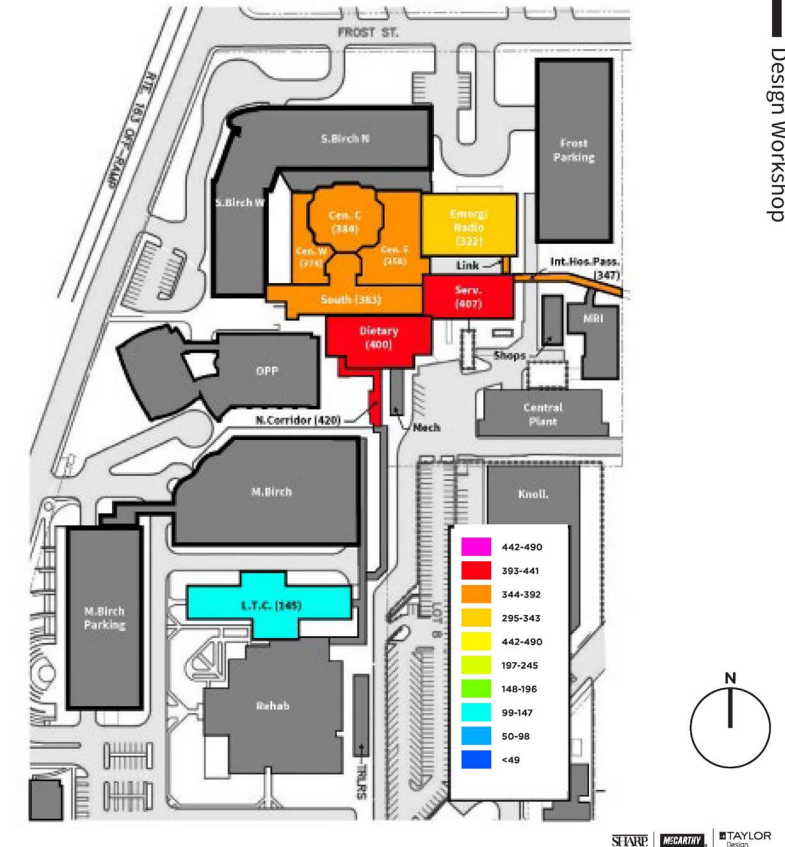
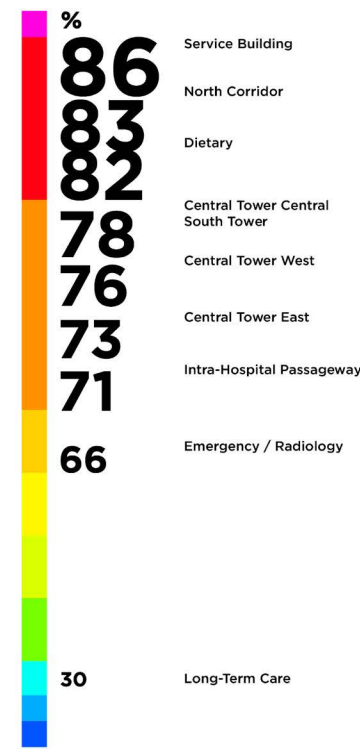
Our participatory human-centered design process was put into action on a recent master plan effort with Sharp Memorial Hospital. We facilitated several interactive workshops with key stakeholders and consultants, in which we collaborated our way to consensus and rolled up our sleeves to co-design creative solutions to site challenges.

The break out sessions were critical to specialized focus conversations on aspects of the larger planning effort. The in person meetings with the FRHD group, and healthcare community will bring out the specifics of what ideas are needed to uncover opportunities with Lean tools such as mapping used on this example project.

**HIGHLIGHTS INCLUDE**

- Approximately 250K SF renovation
- Approximately 450K SF new construction
- Approximately 250K SF demolition
- New 7-story building connected to a new 6-story addition
- 88 new OBS beds (designed like patient rooms)
- 30 new ED bays with 4 new trauma bays
- 12 new ICU beds
- 72 new ACU beds
- Fully integrated interventional platform (surgery, Cath, IR, hybrids, + ICUs)

**SMH HEAT MAP**



**Sharp Experience Blueprint**

	REGULATORY	ACUTE CARE	UTILIZATION	STAFF	PATIENTS	SITE	OUTREACH	COMMUNITY	RESOURCES
<b>Mission</b> To improve the health of those we serve with a commitment to excellence in all that we do. Sharp's goal is to offer quality care and services that set community standards, exceed patients' expectations, and are provided in a caring, convenient, cost effective, and accessible manner.									
<b>Vision</b> • The best place to work • The best place to practice medicine • The best place to receive care • The best health system in the universe									
<b>Core Values</b> INTEGRITY CARING SAFETY INNOVATION EXCELLENCE									
<b>Pillars of Excellence</b> 1. Quality 2. Safety 3. Service 4. People 5. Finance 6. Growth 7. Community									
<b>High-Reliability Organization (HRO)</b> • Founded on the Sharp Experience • Promoting mutual respect and teamwork • Creating a culture of safety • Continuously improving our process • Engaging patients, physicians and employees									
<b>Master Plan Priorities</b>	Regulatory → Clinical → Patient → Admin → Enhancements								
<b>TRUE NORTH INDICATORS</b>	Meet seismic regulatory deadlines (SD 1953) without triggering more LRPEI requirements than necessary.	Focus on needs of acute care operations and revenues. Determine bed count.	Provide for growth in beds and support spaces with increased utilization rates. Pharmacy, imaging	Improve staff experience through improved operations and flow.	Improve aesthetic experience of select public spaces (interior & exterior). PACU, pre-op, endo-inpatient	Create a visible arrival experience for campus with improved pedestrian and vehicular flow.	Develop a story to align stakeholders, drive design and inspire community support. Kitchen/dining	Be good neighbors by reducing impact on surrounding neighborhoods. Conf/training, facades, common area upgrades	Position new and existing assets for long-term resource efficiency.
<b>KEY PERFORMANCE METRICS</b>	Upgrade to SPC-4D or remove from acute care service by 2030.	No construction-related drop in revenue.	Bed utilization across affected all departments near 85%.	Statistically significant improvement in staff satisfaction survey scores.	Statistically significant improvement in Press Ganey scores	Exceeds expectations.	Establish and achieve campaign goal.	Improve vehicular capacity and flow with fewer conflicts or interruptions	Reduced maintenance costs at plan end, same or lower than plan start (adjusted for inflation).
<b>CUSTOMER VALUES</b>	Fix regulatory deficiencies Navigate LRPEI Leverage opportunities to retrofit to SPC-4D standards vs building new Upgrade ADA and code compliance Improve parking / traffic	Avoid disruption Provide realistic impact expectations Maintain revenue throughout Focus on acute care	Accommodation of growth Create flexible beds Plan for future healthcare tech Provide adequate storage Achieve high bed utilization Provide space for IT Capture all the must have priorities Plan for post 2030 on-site development	Improve staff safety Be best place to work Be best place to practice medicine Lean operations No 2nd Class Buildings	Improve patient experience Be best place to receive care Improve public spaces Improve patient safety Support patient technology	No silver bullet required Improve wayfinding Improve street visibility Define the front door Improve arrival experience Provide great 1st & last impressions Improve flow of pedestrian and vehicular traffic	Create a new beginning story Align story with Sharp Goals Capture story with a catchy slogan Have a story to tell about it	Be good neighbors Reduce traffic Improve circulation	Reduce water use Provide for recycling Best use of existing assets Realistic facility condition assessments Reduce long-term maintenance Achieve performance certifications Create high reliability operation



# don knabe wellness center

*rancho los amigos national rehabilitation center*

SIZE 12,000 SF COST \$12.1M COMPLETED 2016

The Don Knabe Wellness Center and Plaza is only the first phase of a \$460 million state-of-the-art renovation at Rancho Los Amigos National Rehabilitation Center, one of the nation's top hospitals for rehabilitative medicine. While the new facility is equipped with a therapy swimming pool that has an underwater treadmill, weight-lifting room, dance studio, cardio and yoga room, the Rancho Los Amigos community is

more appreciative of what this wellness center symbolizes — a place where miracles happen and hope is revitalized. For patients, the 12,000 square foot space offers a bit of everything, even a meditative garden, where they can relax after a game of wheelchair basketball or a workout in the gym with equipment specially designed for people in wheelchairs.



This Wellness project started with initial programming and is a good example of how the space was designed for future flexibility and community based health care similar to the Community Health & Wellness Center.





The Linear Accelerator 16 project included the replacement of an existing linear accelerator with a new system. The clinical workflow within the room was rearranged to improve the radiation therapist's access to the equipment. The entire patient experience was also updated to reduce stress and provide a more comfortable environment.

The design also added a patient touchdown station with casework to receive patient belongings, a bench for seated rest if necessary, and a mirror for adjusting one's appearance before returning to the public corridors. To support the new more powerful linear accelerator, the existing vault required major

lead plate supplementation that needed to be integrated with the existing vault and coordinated with various ceiling-mounted camera and monitor booms. The project also included installation of an Optical Surface Management System for patient positioning in an adjacent linear accelerator vault.

Program: Linear accelerator scan room, Radiation shield upgrades, Linear accelerator control room, and Infrastructure upgrades

*This example really focuses on the users experience of the space, providing a good example of how taking the simple concept that originates from the early visioning can play out in the design.*



# linear accelerator 16

*stanford health care*

SIZE 864 SF COST \$1.3M RENOVATION, OUTPATIENT, DESIGN-BID-BUILD COMPLETED 2019

TAYLOR design



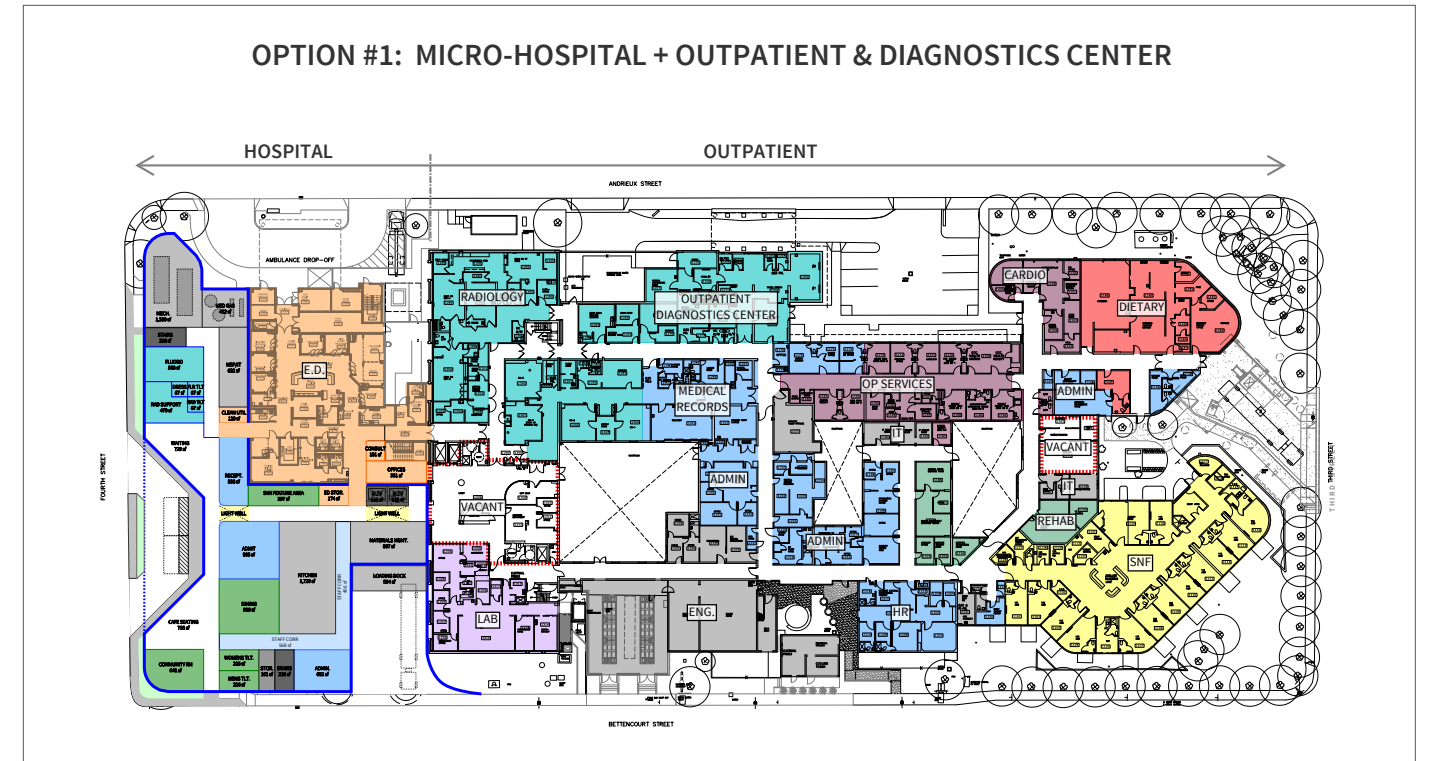
# master plan study

## sonoma valley hospital

SIZE 75-beds COST \$5M RENOVATION | & NEW CONSTRUCTION COMPLETED IN 2019



Sonoma Valley Hospital is a 75-bed, full-service acute care district hospital, with an outstanding staff of health care professionals located in the heart of the City of Sonoma. The new master plan would include approximately \$75M of demolition and replacement of non-SPC buildings.



This Master Planning project required a very similar approach to looking at both the current state, but also envisioning what could be. With the Fallbrook Community Health and Wellness Center, we plan to utilize similar Lean Planning tools to help focus the design around the highest priorities while discovering meaningful solutions to the challenges presented.

### PROJECT UNDERSTANDING

In light of the upcoming 2030 deadline for the Alquist Hospital Seismic Safety Act (AHSSA), Sonoma Valley Hospital enlisted Taylor Design to help create a Master Plan that studies the possibilities for evolution to the Sonoma Valley Health System through the year 2030 and beyond.

Taylor Design will facilitate the creation of the Master Plan through three workshops with the SVH Core Team to define a project story. The story will build on previous work and findings,

current drivers and influencers, and fuse with the forecasted trends and clinical needs. The intent is to discover meaningful project opportunities, inspirations, and insights.

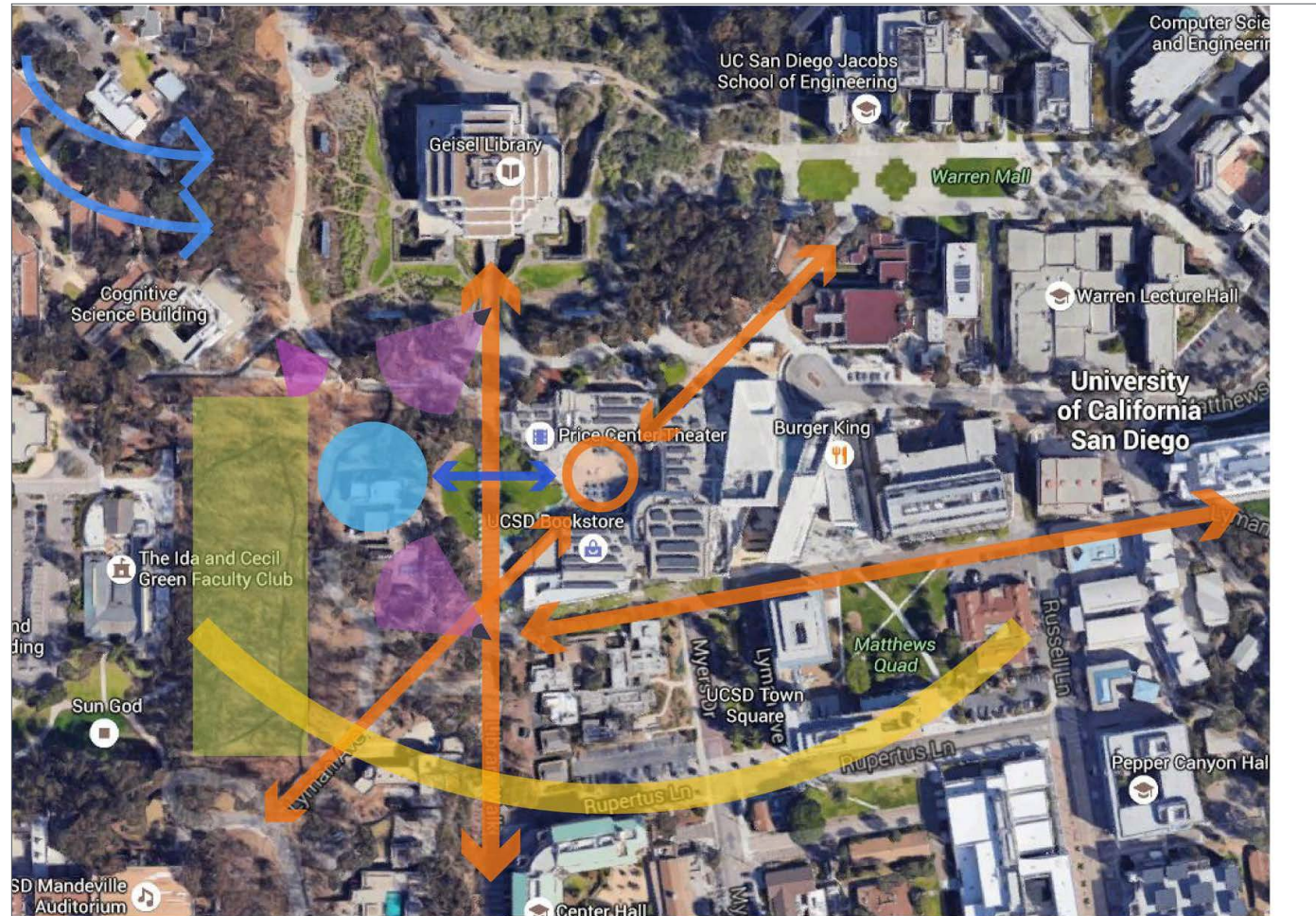
### PROJECT CONCLUSION

Guided by a newly formed project story, the design team will advise how to evolve the acute care part of campus, have a plan in place to respond to seismic regulatory deadlines, make best use of the existing structures and property, account for growth in different service lines and support spaces, improve wayfinding, and create a sense of place while connecting disparate aesthetics within new spaces and buildings facades. At the completion of the Master Plan workshops, Taylor Design will provide SVH Health System plans that depict the discussions and objectives of the core group through 2020, 2025, 2030, and 2030+.



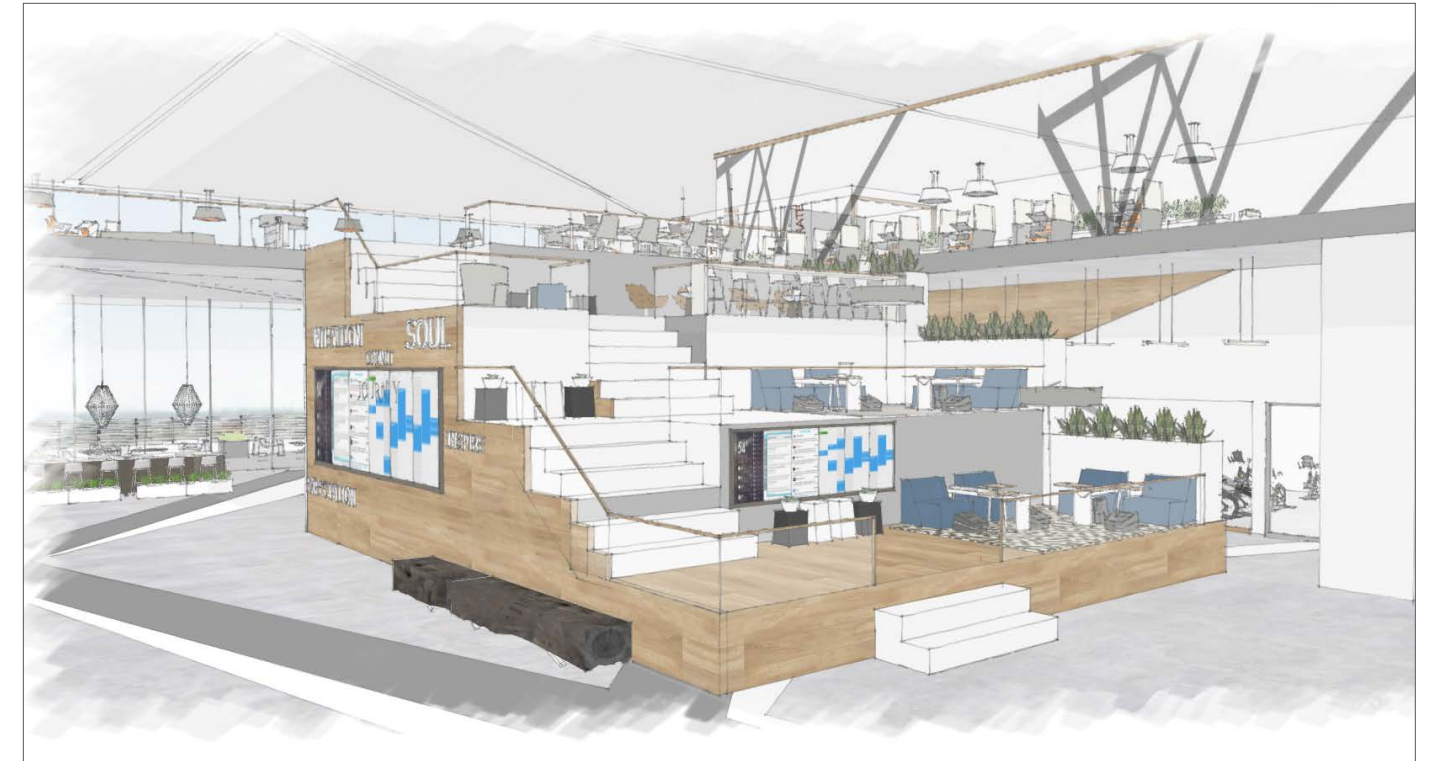
# student health and wellbeing center expansion

university of california, san diego



Site analysis for the University of California, San Diego Student Health and Wellbeing Center, located in La Jolla, California.

This project was a good example of how we placed the current assumptions aside to meet and think big picture together. Then while doing the validation of program and future needs of how they would ultimately want to provide Healthcare, together we were able to get to a program that will meet their future needs. The real time cost estimating and providing options allowed the University to make better decisions based on supporting information which will be essential for the Fallbrook Community Health and Wellness Center. We plan to implement a similar upfront strategy on this project, including site analysis and blue sky thinking.



## PROJECT UNDERSTANDING

In light of the upcoming 2030 deadline for the Alquist Hospital Seismic Safety Act (AHSSA), Sonoma Valley Hospital enlisted Taylor Design to help create a Master Plan that studies the possibilities for evolution to the Sonoma Valley Health System through the year 2030 and beyond.

Taylor Design will facilitate the creation of the Master Plan through three workshops with the SVH Core Team to define a project story. The story will build on previous work and findings, current drivers and influencers, and fuse with the forecasted trends and clinical needs. The intent is to discover meaningful project opportunities, inspirations, and insights.

## PROJECT CONCLUSION

Guided by a newly formed project story, the design team will advise how to evolve the acute care part of campus, have a plan in place to respond to seismic regulatory deadlines, make best use of the existing structures and property, account for growth in different service lines and support spaces, improve wayfinding, and create a sense of place while connecting disparate aesthetics within new spaces and buildings facades.

At the completion of the Master Plan workshops, Taylor Design will provide SVH Health System plans that depict the discussions and objectives of the core group through 2020, 2025, 2030, and 2030+.



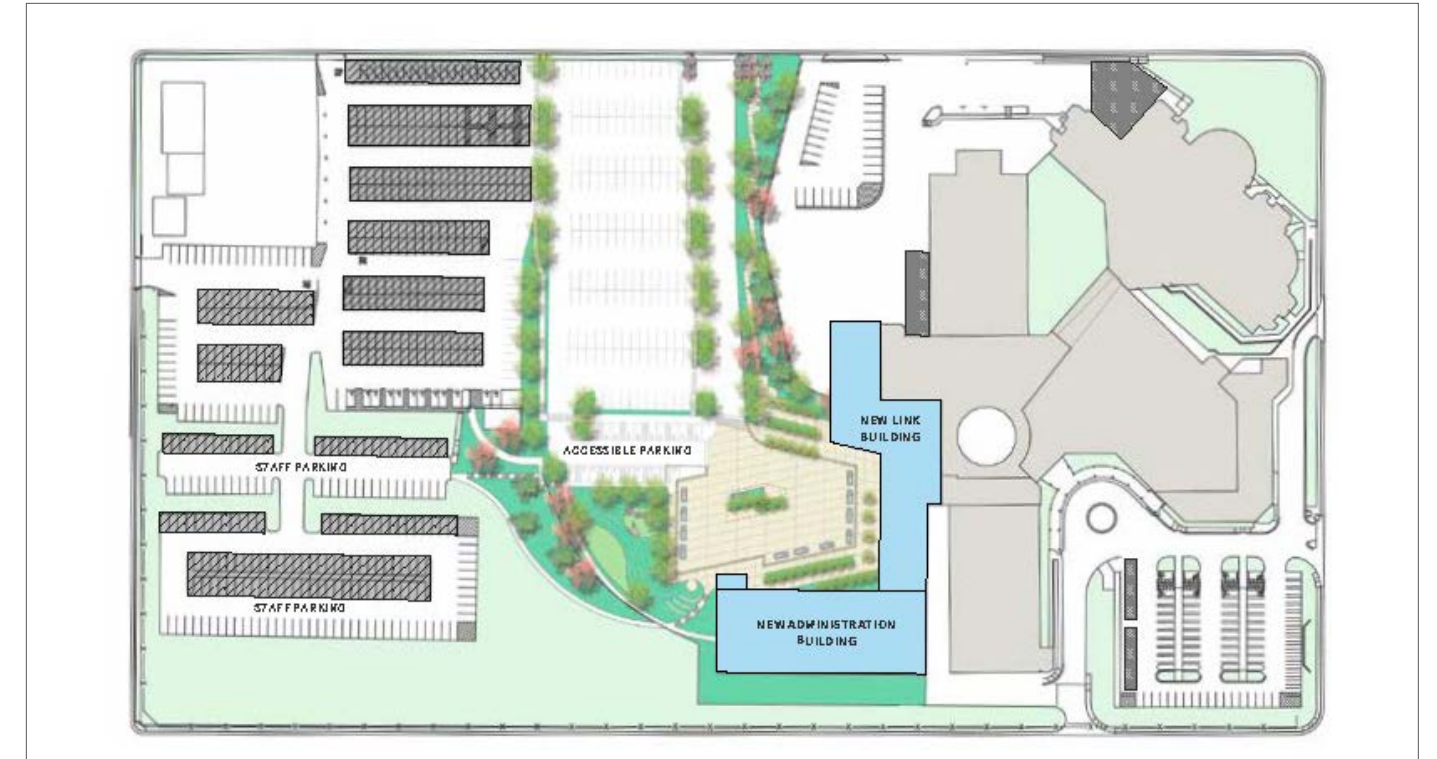
# master plan

## san mateo county health system

COST \$120M MASTER PLAN | DEMOLITION / REPLACEMENT OF NON-SPC BUILDINGS  
HOSPITAL INTERDEPARTMENTAL FLOW COMPLETED IN PROGRESS



Through the evaluation of the desired evolution of the campus determined by our up front research, we were able to provide them options that provide optimal efficiency. The importance of this comparison to what we will want to provide on the Wellness Center, is finding the "True North Indicators" can provide the guidance for all projects that follow through phasing of the larger vision.



The San Mateo County Health System Campus, located in the City of San Mateo, is home to multiple divisions of the County Health System, including the San Mateo Medical Center. Further, it is a public hospital and clinic system fully accredited by The Joint Commission. The Medical Center operates outpatient clinics throughout San Mateo County and an acute-care hospital in San Mateo, California. This master plan effort will provide a roadmap to identify future needs, prepare a programmatic cost estimate, address the medical center, enhance operational efficiency and improve financial performance through improved work flow, sustainable design and technological advances.

One particular focus of the master plan is to plan for the future needs of Behavioral Health and Recovery Services (BHRS). The County is a primary provider of care for residents in need of

behavioral health services. Our recommendations suggest providing services at decentralized locations, more convenient to where residents live or work. The master plan addresses the continuum of care from The Master Plan includes the following:

- Evaluate factors that will influence the demand for services and the future evolution of the campus.
- Evaluate the need to expand or reconfigure services and facilities to support the vision for the campus.
- Improve operational efficiency and improve financial performance.
- Resolve parking challenges.
- Address California's seismic safety mandates.





# community center

*latino health access*

SIZE 3,188 SF COST PRO BONO NEW CONSTRUCTION, DESIGN-BUILD | COMPLETED IN 2009

The Latino Health Access community center was developed to provide a gathering spot in the community to promote healthy, active families. Consistent with this ideal, the design of the building also strives to be healthy for the community and the planet. As the first community-driven recreational and educational public space of its kind, this center represented a historic effort by promoting health and wellness in a resource-challenged community.

A mother brought the park concept to Latino Health Access and then additional parents joined to form Parents with Green Hearts. Local families provided input into the project design, had a prominent volunteer role in the maintenance of the facility and grounds, and helped to raise funds to support construction of the project. McCarthy

Building Companies, Taylor Design, and Petra ICS (formerly St. Joseph Health System) donated numerous hours of architectural and preconstruction services.

Programs and services offered by the center include health promotion and disease prevention, children's initiatives, mental health, and community engagement and advocacy.

Program: The community center encompasses 2,500 sf, with a full-size kitchen, lobby, office space, restrooms, large multi-purpose room, community educational and meeting space, audio-visual equipment, a portable stage for large community events, and mobile room dividers. The park has open field play areas, a half-size basketball court, two playgrounds with age-appropriate equipment, and restrooms.



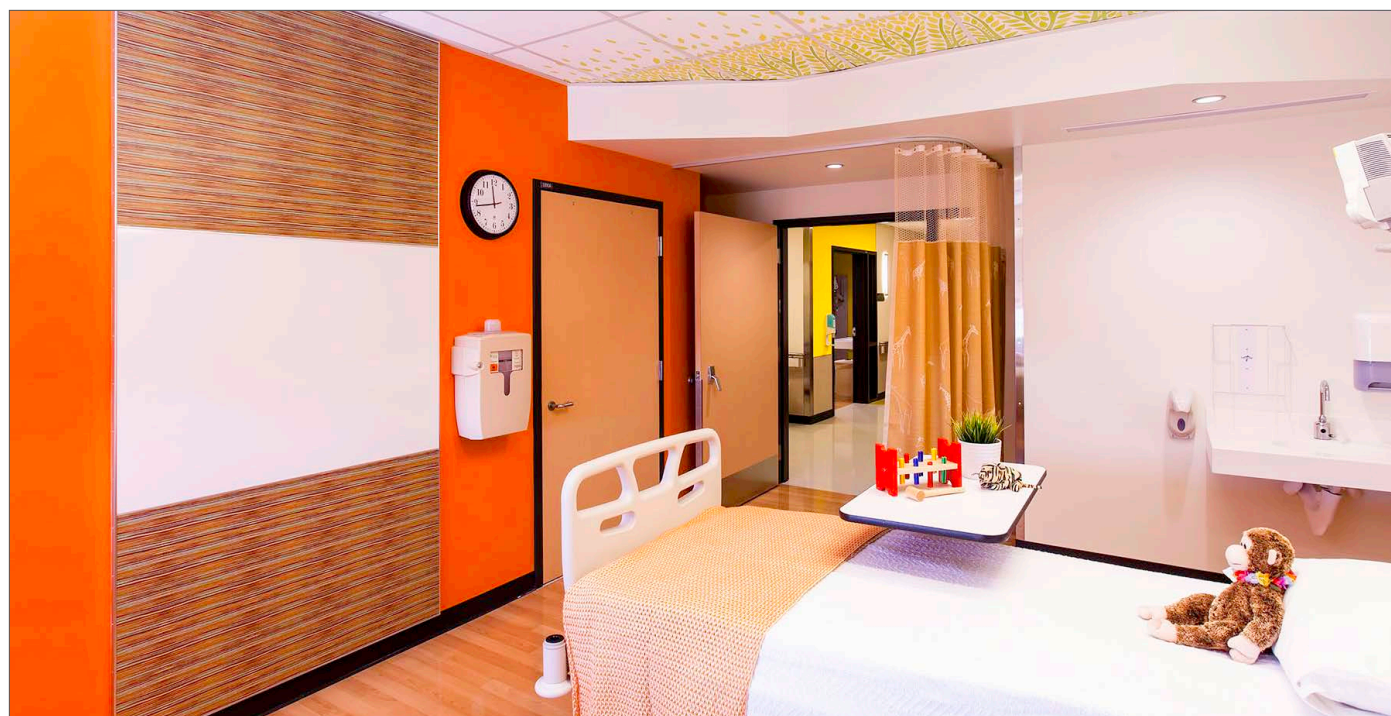
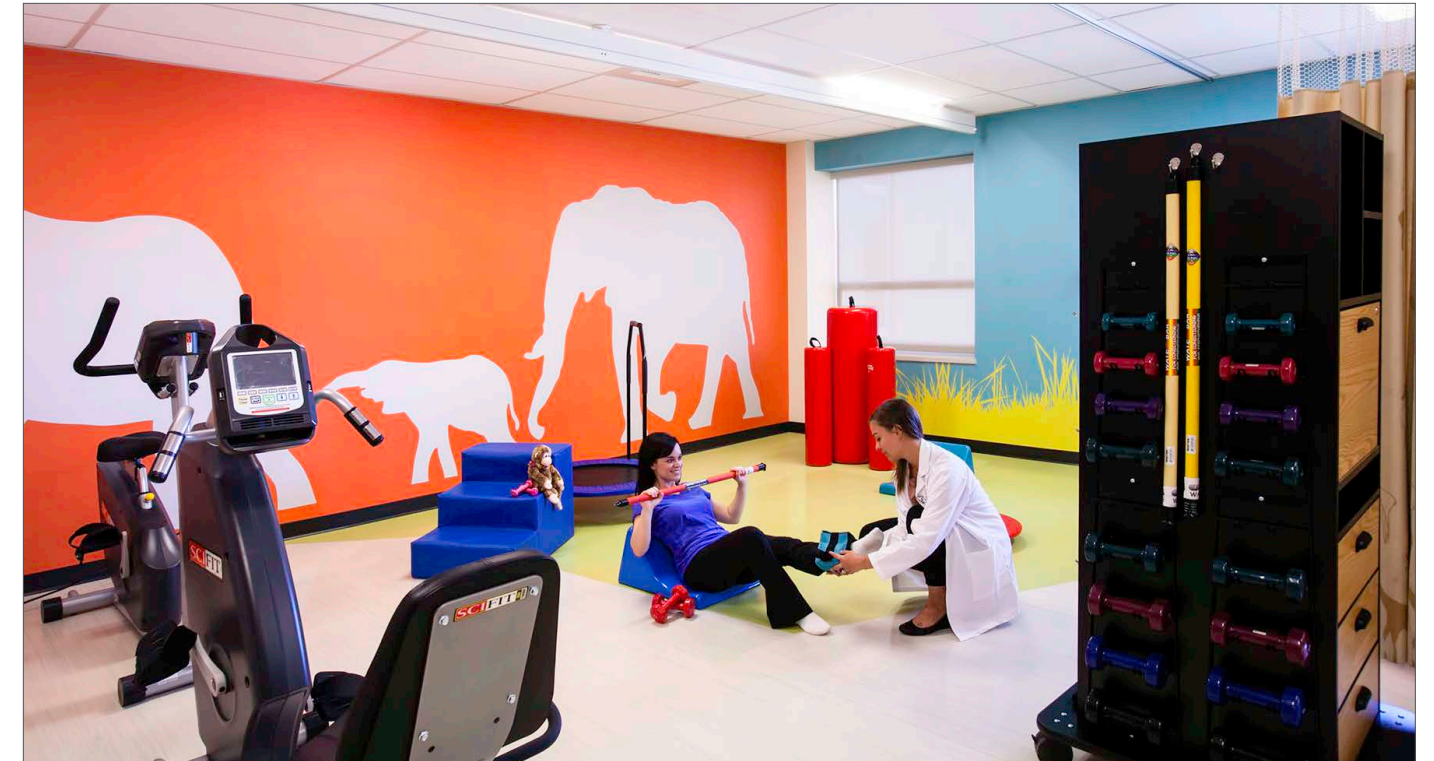
**In working with the Latino Health Access Community Center Team, we understood that the design and the building belonged to its people and it needed to speak to the community, getting their involvement was the only way to achieve this.**



# 6th floor pediatric rehabilitation unit

children's hospital los angeles

SIZE 22,300 SF COST \$7M RENOVATION, INPATIENT COMPLETED IN 2016



The Department of Rehabilitation Services at Children's Hospital Los Angeles provides personalized treatment for children with disabilities to promote development of skills and abilities to meet their greatest potential, while also providing support and education to families. The unit occupies an airy "penthouse" floor which maximizes window views and provides natural light. Community spaces include a rehabilitation gym, kitchen, play room, and craft room. ADL (Activities of Daily Living) Spaces are provided to create a smooth transition from hospital to home after the rehabilitation program has been completed. The safari-themed design creates a whimsical atmosphere with centralized nurse stations as "giving trees" and floor patterns in the corridors creating mile markers and goals.

The patient gym features large-scale graphics and bright colors for the patients to direct their focus during times of physical discomfort. Patient rooms provide private space for family members so they can support their loved one throughout their stay.

Project Scope: Approximately 22,306 SF interior remodel of existing 6th floor. Relocated existing 32-bed pediatric nursing unit. Relocated 28-bed inpatient rehabilitation center. The 22-bed unit includes a physical therapy gym, play room, dining/recreational room, clinical support spaces and staff lounge/offices. Wellness comes in many forms, not just in the caring of physical bodies, but also in the education of minds, and providing engagement to participate. This project is a good example of this.



key team members



**Joe Lowe** AIA, LEED AP, DBIA ASSOC., NCARB, LEAN SIX SIGMA

**Project Director**

Joe is a licensed architect and brings over 15 years of experience to his role as leader of Taylor Design's San Diego office. His passion is collaborating to help fill our client's needs in a meaningful way. As a member of the Planetree network, Joe takes a user-centered and evidenced-based design approach in his work. As Project Director, Joe Lowe is responsible for leading multiple project teams, consultants, and clients from start to finish on projects. Joe's primary role consists of cultivating relationships, maintaining project schedules, budgets, and project procurement. Other responsibilities included design solutions, code analysis, client and consultant meetings, business development, and marketing.

**Relevant Experience**



**John R. Anderson V Medical Pavilion Scripps Memorial Hospital La Jolla**

La Jolla, CA  
The clinic features four outpatient cardiac catheterization labs, office and administration space, diagnostic facilities, and roughly 15 medical procedure departments.

**Role** Project Director



**Palomar Rehabilitation Institute Kindred Healthcare**

Escondido, CA  
The hospital will feature specialty areas based on the type of rehabilitation patient, a state-of-the-art gym facility, pharmacy, dining room and kitchen.

**Role** Project Director

**Education**

Master of Architecture - New School of Architecture & Design, San Diego, California

B.S., Science in Design - Arizona State University, Tempe AZ

**Registrations + Affiliations**

Licensed Architect – California #C30454

American Institute of Architects

LEED Accredited Professional

DBIA Professional

NCARB Certified

Lean Six Sigma

**Additional Experience**

**Campus ADA Upgrades**  
University of California, San Diego  
San Diego, California

**Campus ADA Upgrades**  
University of California, Riverside  
Riverside, California

**Thornton Hospital Admissions Remodel**  
UC San Diego Health  
San Diego, California

**Infusion Center and Multi-Specialty Clinic (OSHDP 3)**

UC San Diego Health System  
San Diego, California

**Student Health and Wellbeing Center Expansion Study**  
University of California, San Diego  
San Diego, California

**Vista MOB Eye Services**  
Kaiser Permanente  
San Diego, California

**Psychiatric Rooms Remodel**  
UCSD Medical Center - Hillcrest  
San Diego, California

**Central Utilities Plant**  
University of California, San Diego  
San Diego, California

**Thornton Hospital Admissions Remodel**  
UC San Diego Health  
San Diego, California

**Medical Office Building Tenant Improvement\***

Rady Children's Hospital  
San Diego, California

**Rancho Bernardo Medical Office Building Tenant Improvement\***  
Kaiser Permanente  
San Diego, California



**Thomas Clark** AIA

**Senior Project Manager**

Thomas brings over 30 years of experience in facility management and planning, architectural design, construction coordination and sustainable design. His strengths include working with user and community groups, design professionals, agencies and contractors to plan and develop viable cost-effective facilities. As a former Director of Facilities and Planning for San Marcos Unified School District and Senior Project Manager for the San Diego Unified School District, Thomas has used his unique insight and experiences to plan and design educational facilities in various environments.

**Education**

Bachelor of Architecture, University of Colorado, Boulder

**Registrations + Affiliations**

Licensed Architect - California #C10491

American Institute of Architects (AIA)

**Relevant Experience**



**Palomar Rehabilitation Institute Kindred Healthcare**

Escondido, CA  
The hospital will feature specialty areas based on the type of rehabilitation patient, a state-of-the-art gym facility, pharmacy, dining room and kitchen.

**Role** Quality Control

**Additional Experience**

**Campus ADA Upgrades**  
University of California, San Diego  
San Diego, California

**Mayer Hall Popmintchev Laser Laboratory**  
UC San Diego  
San Diego, California

**Tenant Improvements**  
Janssen Pharmaceutica  
San Diego, California

**Industrial Technologies Center\***  
(Pending DSA Approval)  
Palomar Community College  
Palomar, California

**SERE Training Facility\* Marine Corps Base Camp Lejeune**  
Jacksonville, North Carolina

**Naval Base San Diego Administration and Training Facility\***  
US Navy  
San Diego, California

**Head Quarter Command Classrooms\***  
Marine Corps Base Camp Lejeune  
Jacksonville, North Carolina

**Bernardo Heights High School\***  
(DSA Approved)  
Poway Unified School District  
Poway, California

**Classrooms\***  
Marine Corps Base Camp Lejeune  
Jacksonville, North Carolina

**Campus of Applied Science\***  
Del Lago Academy  
Escondido Union High School District  
Escondido, California

**Adult School & ROP\***  
Escondido Union High School  
Escondido, California

**Joli Ann Elementary School \***  
(DSA Approved)  
San Marcos Unified School District  
San Marcos, California

**San Elijo Elementary School\***  
(DSA Approved)  
San Marcos Unified School District  
San Marcos, California

**San Elijo Middle School\***  
(DSA Approved)  
San Marcos Unified School District  
San Marcos, California

**Mission Hills High School\***  
(DSA Approved)  
San Marcos Unified School District  
San Marcos, California





## Jen Leonard

### Design Strategy Practice Leader

Jen leads our strategy-based approach at Taylor Design, energizing the creative process from initial brief to concept development. With a combined background in journalism and human-centered design, her style is inquisitive and participatory. She partners with clients, team members, and end users to spark conversations, re-imagine possibilities, uncover needs, craft stories, and develop frameworks and guiding principles to inspire design. Prior, Jen was a Senior Design Lead at global innovation consultancy IDEO for 10 years, where she designed products, spaces, services and brand strategies across retail, hospitality, finance, automotive and healthcare markets. Past clients include Nike, AT&T, Marriott, Visa, Chevrolet, and Texas Children's Hospital.

#### Education

Interdisciplinary Design Strategy Postgraduate Certificate  
The Institute without Boundaries (IwB) at George Brown College, Toronto, Canada (2003)

Master of Arts  
The Graduate School of Journalism, The University of Western Ontario, London, Canada (1997-)

Diploma in Honors (Cultural Anthropology)  
The University of Western Ontario, London, Canada (1992-1993)

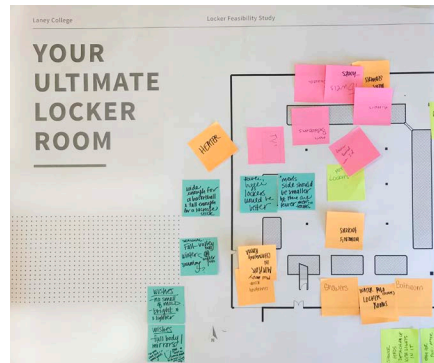
#### Relevant Experience



#### Metropolitan Medical Campus Master Plan

**Sharp Healthcare**  
San Diego, CA  
The 2019 Master Plan was designed to help Sharp meet 2030 seismic requirements in six phases, each considered an "off-ramp" should conditions change.

**Role Design Strategist**



#### Laney College Locker Room Feasibility Study

**Peralta Community College District**  
Oakland, CA  
The study was conducted to help ensure equity for female athletes and included a conceptual layout and associated cost estimate.

**Role Design Strategist**

#### Additional Experience

**Metropolitan Medical Campus Master Plan**  
Sharp HealthCare  
San Diego, California

**Master Plan**  
Sonoma Valley Hospital  
Sonoma, California

**ValleyCare Interventional and Radiology Platform Remodel**  
Stanford Health Care  
Pleasanton, California

**Acute Care Building**  
Scripps Memorial Hospital  
Encinitas, California

**Huntington Beach Medical Office Building**  
Kaiser Permanente  
Huntington Beach, California

**Workplace Strategy**  
OnLok  
San Francisco, California

**Sylmar Mental Health & Wellness Renovation**  
Kaiser Permanente  
Panorama City, California

**Legacy Suites**  
Providence Little Company of Mary  
Torrance, California

**Mayer Hall Popmintchev Laser Laboratory**  
University of California,  
San Diego  
San Diego, California

**IR-CT Remodel**  
Stanford Health Care  
Palo Alto, California

**Various Remodels\***  
Planned Parenthood  
New York, New York  
Nationwide



## Eric Peabody LEED AP BD+C

### Principal | Project Director

Eric's experience includes highly technical projects which involve complex integration of architecture, equipment, and building systems. As a Project Director, Eric is attuned to the clients' needs and is highly collaborative with the whole project team. He gets involved in the details of construction and brings a practical creative problem solving ability to the design. Eric applies his profound technical aptitude pioneering BIM and Integrated Project Delivery techniques across the firm and the industry saving substantial amounts of time and money for our clients.

#### Education

Bachelor of Architecture with Honors  
Cal Poly State University  
San Luis Obispo, California  
Harvard School of Public Health

Guidelines for Laboratory Design: Health and Safety Considerations

PSMJ Project Management  
Bootcamp - Mastering the Art of Design Firm Management

#### Registrations + Affiliations

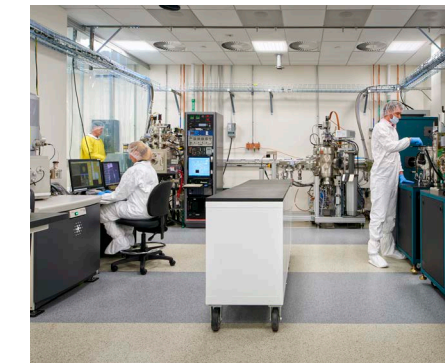
Licensed Architect - California  
#C31787

Registered Architect - Washington  
#9957

Registered Architect - Arizona #5082

LEED Accredited Professional BD+C

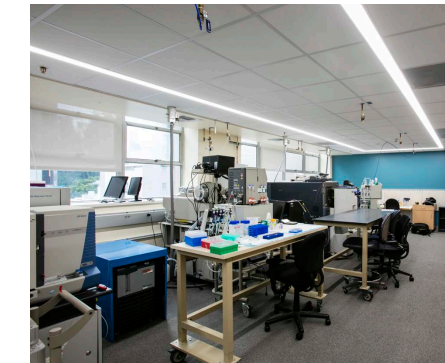
#### Relevant Experience



#### Siddiqi Quantum Nanoelectronics Lab Cleanroom

**UC Berkeley, Berkeley, CA**  
Taylor Design was asked to plan and design this project located in Campbell Hall by the research group headed by Dr. Irfan Siddiqi. The lab houses three distinct clean room spaces.

**Role Project Manager**



#### Medical Sciences Building 7 & 8

**UC San Francisco Medical Center**  
San Francisco, CA

This 10,000 SF project includes a complex array of five different laboratory groups including Mass Spectrometry, Laboratory Medicine, Rheumatology, Dentistry, and an Orofacial Clinic Program.

**Role Project Manager**

#### Additional Experience

**ACC5 Heart & Vascular Clinic Renovation**  
(LEED Certified)  
UC San Francisco Medical Center  
San Francisco, California

**Stanley Hall B327 Renovation**  
UC Berkeley  
Berkeley, California

**Sinsheimer Cryo-Electron Microscope Lab**  
UC Santa Cruz  
Santa Cruz, California

**MSB S534 Golden Lab Remodel**  
UC San Francisco  
San Francisco, California

**MSB Cell Analysis Core Laboratory**  
UC San Francisco  
San Francisco, California

**Building Renewal Program**  
UC San Francisco  
San Francisco, California

**Genentech Hall Andino BSL-3 Lab Remodel**  
UC San Francisco  
San Francisco, California

**Multi-campus ADA Transition Plan**  
UC San Francisco  
San Francisco, California

**STEM Laboratory 911E Remodel**  
UC San Francisco  
San Francisco, California

**MSB S791 BSL-3 Laboratory Remodel**  
UC San Francisco  
San Francisco, California

**HSE 1020C Laboratory Remodel**  
UC San Francisco  
San Francisco, California





# Stephanie L'Estrange IIDA, CID

## Interior Design Practice Leader

Stephanie brings a depth of knowledge with 20 years of experience gained from extensive work on complex projects. She is highly organized and has the ability to understand the impact of design decisions on budget and schedule, allowing time to address them early and manage expectations. A critical thinking strategist, her creative skills allow analysis of building challenges from differing viewpoints, leading to successful solutions. As Practice Leader, she brings a key capacity to recognize the specific demands of a particular location and tailor the design process to be efficient and productive. Her involvement includes assessment of building conditions, brand campus settings, ensuring design integrity and adherence to the client's vision.

### Relevant Experience



#### Spine Center Clinic Renovation UC San Francisco Medical Center San Francisco, CA

The ACC2 Spine Center Renovation houses clinical function such as a state of the art EOS machine for 3-dimensional spine scans, as well as shared and private offices and a conference room.

**Role** Interior Design Practice Leader



#### Neurology Conference Room Renewal UC San Francisco San Francisco, CA

Taylor Design created an executive conference room for staff operations as well as resident interviews. The space features a wall of sliding magnetic glassboards, venetian plaster art, and a comprehensive AV system.

**Role** Interior Design Practice Leader

### Additional Experience

#### Education

Bachelor of Science  
Interior Architecture and Design  
University of San Francisco

#### Registrations + Affiliations

Certified Interior Designer (CID),  
IIDA #308175

International Interior Design  
Association (IIDA), Committee  
Member

**Sinsheimer Cryo-  
Electron Microscope Lab**  
UC Santa Cruz  
Santa Cruz, California

**Fremont 2S, 2N, ICU  
Upgrade**  
Kaiser Permanente  
Fremont, California

**Palomar Rehabilitation  
Institute**  
Kindred Healthcare  
Escondido, California

**Acute Care Building**  
Scripps Memorial Hospital  
Encinitas  
Encinitas, California

**Master Planning, Kitchen  
& Lobby Renovation**  
The Sequoias - Portola  
Valley  
Portola Valley, California

**300P MOR, PACU, and  
Morgue Remodel**  
Stanford University  
Medical Center  
Palo Alto, California

**San Mateo Health  
System Campus  
Upgrade**  
San Mateo County  
San Mateo, California

**San Mateo Medical  
Office Improvements**  
Kaiser Permanente  
San Mateo, California

**Fremont Medical Office  
Buildings Legacy  
Refresh**  
Kaiser Permanente  
Fremont, California

**Intuit\***  
Sydney, Australia  
Singapore, Asia  
Tel Aviv, Israel  
Sao Paulo, Brazil

\*Previous experience of Stephanie L'Estrange



# Aaron Mckenzie

## Senior Strategist

Aaron is an experienced researcher, strategist, and designer who focuses on creating a thriving, equitable and successful future at Taylor Design. Aaron works tirelessly to catalyze the creative process from initial brief to concept development. With a rich background in project management, design strategy, and (UX) user experience design, his style is empathic, inquisitive, and energetic. Aaron partners with clients, team members, and end users to spark conversations, re-imagine possibilities, uncover needs, craft stories, and develop frameworks and guiding principles to inspire design.

#### Education

Master of Design, Interaction  
California College of the Arts  
San Francisco, California

Bachelor of Fine Arts, Industrial  
Design  
California College of the Arts  
San Francisco, California

Bachelor of Arts, History  
University of California, Davis  
Davis, California

#### Distinctions

Invited Designer, Who is Oakland  
Exhibition (2016)  
Oakland Museum of California  
Oakland, California

Invited Designer, Social In Practice  
(2015)  
Yerba Buena Center for the Arts  
San Francisco, California

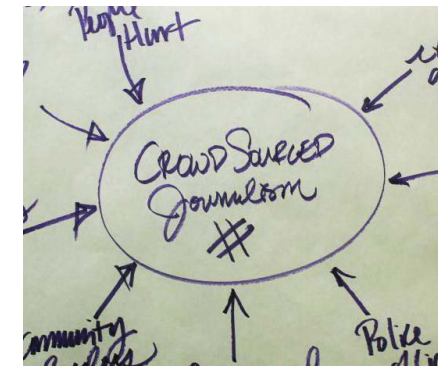
### Relevant Experience



#### Fremont ICU Redesign

**Kaiser Permanente** Fremont, CA  
The research and workshops were designed to understand both operational and functional opportunities and challenges to best serve patients, providers, and visitors within tight budgetary constraints.

**Role** Senior Strategist



#### Strategic Vision Planning

**Center for Investigative Reporting**  
Emeryville, CA

This process leveraged community-based co-design sessions, market trend analysis, and service design proposals to deliver opportunities for sustained fiscal health and strengthened community engagement.

**Role** Senior Strategist

### Additional Experience

**Laney College Locker  
Room Full Renovation**  
Peralta Community  
College District  
Oakland, California

**Master Palette Redesign**  
Kaiser Permanente South  
San Francisco  
San Francisco, California

**Community Clinic and  
New Office Design**  
San Francisco AIDS  
Foundation  
San Francisco, California

**Intensive Care Unit  
Redesign**  
Kaiser Permanente  
Fremont, California

**Community Based Co-  
Design\***  
Silicon Valley Bicycle  
Coalition and Stanford  
Hospital & Clinics  
Palo Alto, California

**Campus Unification  
Qualitative Research\***  
California College of the  
Arts  
San Francisco, California

**Comprehensive  
Organization Redesign\***  
PTG Linen Service  
San Leandro, California

**Service Framework  
Redesign\***  
Hack the Hood  
Oakland, California

\*Experience prior to joining Taylor Design



# professional services rate schedule

2019 Professional Services Rate Schedule

<u>Title/Job Classification</u>	<u>Hourly Rate</u>
Principal	\$ 260.00
Project Director	\$ 225.00
Senior Project Manager	\$ 200.00
Project Manager	\$ 175.00
Senior Project Architect	\$ 210.00
Project Architect	\$ 190.00
Architect	\$ 155.00
Senior Construction Specialist	\$ 210.00
Construction Specialist	\$ 190.00
Senior Job Captain	\$ 155.00
Senior Project Designer	\$ 200.00
Project Designer	\$ 170.00
Designer	\$ 155.00
Senior Interior Designer	\$ 185.00
Lead Interior Designer	\$ 165.00
Interior Designer	\$ 145.00
Interior Design Assistant	\$ 125.00
Senior Strategist	\$ 170.00
Strategist	\$ 155.00
Job Captain	\$ 145.00
Design Assistant	\$ 125.00
Intern	\$ 90.00
Project Administrator	\$ 145.00
Project Assistant II	\$ 115.00
Project Assistant I	\$ 90.00

Reimbursable expenses billed at 1.10 times Taylor Design's cost.  
Rates subject to change annually.



A photograph of three women with blonde hair, wearing sunglasses and holding handfuls of colorful confetti. They are blowing the confetti into the air, creating a festive and joyful atmosphere. The background is a blurred green, suggesting an outdoor setting with foliage.

# TAYLOR design

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