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Attendee Comments

"Networking was great. Good chemistry among attendees"

"Content and Networking opportunities were excellent and pace of presentations were ideal"

"Open dialog"

"Location and presenters"

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Florida 2018 - Post Summit Recap



Key Takeaway Messages April 06, 2018, Orlando, Florida

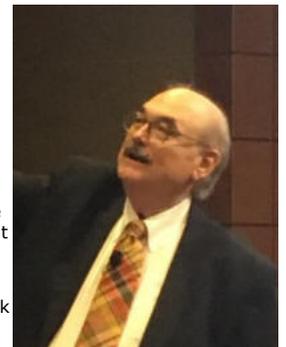
Reported by Dan Tracy, a freelance writer based in Orlando and veteran of The Orlando Sentinel

What's Driving Healthcare – A Look at the Numbers

Alan Whitson, president of Corporate Realty, Design & Management Institute

TAKEAWAY MESSAGES

- **Significant change is on the way.** "If that scares you, it should. It's going to change." Inpatient stays at hospitals peaked nationally in 2008 at more than 35 million. It dropped to about 33 million in 2014. "Length of stay is a fast turnover."
- **Outpatient visits are on the rise.** During 2008 there were more than 600 million visits to doctors' offices, free-standing clinics and the like. That number grew to just shy of 700 million in 2014.
- **Overall, inpatient stays** dropped almost 17 percent from 1990 to 2014, while inpatient visits are up 80 percent during the same time frame. The U.S. population, meanwhile, increased nearly 28 percent since 1990.
- **Costs are driving the switch** from hospital beds to outpatient facilities. Insurance companies and the government are cutting back on reimbursements, putting pressure the medical establishment to reduce expenses to remain solvent.
- **The bottom line** for healthcare providers: "Do more for less. Be smart about it. Do more for the patient."



Insiders View of Facilities Guidelines Institute (FGI) Changes for Hospitals & Outpatient Care Facilities

Skip Gregory, Health Facility Consulting, and FGI Health Guidelines Revision Committee

TAKEAWAY MESSAGES

- **Florida will continue to use the 2014 edition** even though a new guideline book for 2018 is being published. But be careful about heaving too closely to the 2014 book. If in doubt, consider seeking guidance from FGI. "You don't want to build something that will make the federal government come down and say, 'That looks nice, but we won't pay for it.'"
- **The number of new guidelines is growing.** In 1987, the book was thin. In 2014, two books were published. For 2018, there are three books: one for inpatient, outpatient and residential. As many as 2,000 revisions are made each cycle. "Everything in the guidelines has to do with patient safety."
- **One example of change** in the minimal standards is that new hospital construction only offers private rooms, as opposed to semi-private or wards. "Would you put up with [roommates] in a hotel room? You wouldn't."
- **Minimum standards** for the size of operating rooms is going up, with 1,200 feet becoming more common because of increasingly sophisticated electronic and robotic needs.
- **Prediction:** All hallways will need handrails to accommodate the needs of an aging population.



"The FGI Guidelines information. Branding was very good as well. Jody (Barry) did a great job"

"The variety of panelists"

"Fairly concise - at the correct level of detail for a one day Summit"

"Timely and interesting topics"

"The variety of topics"

"The informational status and future projection of the healthcare building industry"

"Location"

"Topics on point - Very good speakers; Great pace of presentations; Excellent facility & conference match"

"Panel Discussions"

"Facility and time were fine"

"Content, venue, and attendance quality"

"Pretty good pace; Nice variety of topics; Enjoyable panel discussions; Great information from industry experts"

"Brief sessions, specific to the point"

"Liked short format sessions; Excellent facility"

"Speakers, topics and organizational structure held my attention"

"Speakers & location"

"Terrific meeting and loads of valuable healthcare related information. It was outstanding"

"Thanks for spearheading an excellent program. It was probably one of the most informative, useful, and quick paced days that I have attended in the past three years"

**Health Care Institute of IFMA
President**



Jeffrey Kent
Nemours Foundation

**HCI Orlando Leadership Team
at the Summit**



Samer Hamde
JLL

Ask the Code & Compliance Experts



Tamara Rice (left), Manager Architectural Design and Planning, Tampa General Hospital
Bob Szafranski (right), Corporate Manager Facility Development, Orlando Health

TAKEAWAY MESSAGES

- **Be careful during the design stage** because conflicting agendas can come into play. Do you want to contain costs or build what the patients and medical staff ultimately will need? "The code is always changing. It's very expensive to go back and make changes," Rice said.
- **Building codes can be confusing**, leading to change orders after a design was already agreed upon. "If we do an about-face on you, it wasn't intended. We have to respond to other people, too," Szafranski said. Added Rice: "I'll lock [the design] down, but it will still change," Rice said.
- **Despite always improving and evolving technology**, such as 3-D modeling, construction managers often are chasing an elusive final product. "We find the design is not done until we open the door," Szafranski said.

Where Oh Where is Healthcare Going?



Jody Barry (left), formerly VP/Facilities z& Construction, Adventist Care Centers and Administrative Director/ Strategic Development for Florida Hospitals

Karl Hodges (center), Vice President, Concord Healthcare

William J. Hercules (right), President/CEO, WJH and 2018 President, American College of Healthcare Architects

TAKEAWAY MESSAGES

- **The federal Medicare and state-level Medicaid programs are paying less** than the cost of service, typically less than 90 percent. "The rate of pay is going down," Barry said. That means healthcare providers have to be prudent with expenses.
- **Follow the patient and the money.** More and more hospitals and healthcare providers are building facilities in the suburbs and small towns because that's where the patients are. "Nobody wants to drive downtown and park in a big garage," Hodges said.
- **One way to keep costs down** is to remodel or repurpose existing buildings into healthcare operations, such as turning an old drug store into a doctor's office or a grocery store into an outpatient surgery center. "If we don't have a (profit) margin, we don't have a mission," Hercules said.
- **The future likely will include more "virtual" visits** where the patient Skypes or FaceTimes a doctor or nurse, rather than going to an office or hospital. "The whole idea of bricks and mortar will go away," Barry said.
- **Even though there will be fewer hospital admissions**, the stays will be longer. The reason: "They (the patients) will be significantly sicker," Hercules said.
- **Consolidation will dominate** the industry in coming years. "Strategically, size does matter," Hodges said. "In any business, growth is a strategy."

New Technologies Reshaping Design, Operation and Performance of Healthcare Facilities



Brian Keemer
Schneider Electric



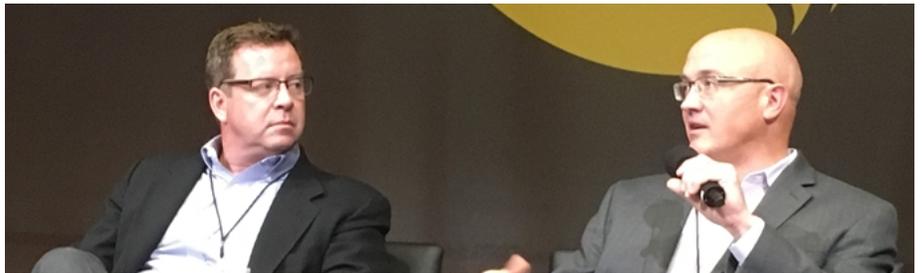
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College of Medicine



Rania Sadrack
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Daniel McGinn (left), Director Life Sciences & Healthcare Segment, Schneider Electric
Taw North (right), Technology Director/Principal, TLC Engineering

TAKEAWAY MESSAGES

- **Never pay for, or install, technology that will go unused.** The best reason to go high tech is to ensure "a safer, more efficient, more reliable facility."
- **Building analytics on necessities like energy performance** and equipment maintenance are critical. "Put the right data in front of the right people," and you can save money.
- **Technology can provide the roadmap** to success when used correctly. "It's a question of how far you want to go. Everybody is trying to create the patient room of tomorrow."

Tips, Tricks & Hidden Traps to Avoid – In-the-Field Experts



Air Filtration/IAQ: **David Blackwell (left)**, Camfil
Roofing: **Doug Schanz (center)**, Johns Manville
Sound Masking: **Michael Griffitt (right)**, Cambridge Sound Management

TAKEAWAY MESSAGES

- **There has been a change for air filters** as manufacturers are required to test filters for a MERV rating. Have the ASHRAE test report for filtration on record.
- **Air filtration optimization is an easy way to drive costs down.** As much as 10 cents per square foot per year can be saved by selecting and changing air filters at the right time.
- **Do not look at the roof as a separate entity.** It is part of the building system and should be considered in relationship to all the other components of the facility.
- **Privacy concerns, especially over HIPAA,** means that sounds and conversations should not travel about a building. Rooms with effective sound masking systems absorb, block and cover conversations and other noises. "You want a system that is uniform throughout (the building)."
- **Leaks are not always the fault of the roof.** A leak could be the result of the overall "system, could be other trades," tromping around on the roof. Know who is up on the roof and why they are there.

How A Medical Center Saved \$70 Million to Fund a Cancer Center Years Ahead of the Original Plan

Dan Conery, e-Builder



TAKEAWAY MESSAGES

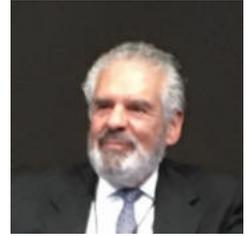
- **Roughly 92 percent of healthcare construction projects are late,** 85 percent are over budget and 63 percent have quality deficiencies when they open. One reason for those abysmal results is poor project management. "You need clearly defined job roles and consistent communication."
- **Simple spreadsheets are a poor way to track construction.** By doing away with simplistic paper trails and spreadsheets and using computerized and centralized cost balancing program, Banner Health, the largest private employer in Arizona, was able to save \$70 million on a construction portfolio of nearly \$1.8 billion. That allowed the institution to jumpstart a cancer center.

Forces Driving Healthcare Real Estate, Development & Acquisitions

Jeff Mason (top), Manager Enterprise Real Estate, Nemours
Michael Noto (bottom), Senior VP/Real Estate Services, Welltower

TAKEAWAY MESSAGES

- **The Baby Boomers are aging**, which means their healthcare needs will increase for years to come. "We're getting older every day. Our demand for healthcare will grow," Noto said.
- **Occupancy rates at healthcare facilities outside of hospitals are holding steady** at 90 to 92 percent, Noto said. That trend likely will hold because Boomers don't want to go to hospitals unless they have to. "We all know outpatient is the word of the day," Noto said.
- **Healthcare construction is all about "getting smarter.** Smaller footprint, better location, consolidation of care options," Mason said.
- **Assisted living facilities may not** be a smart play in the future, Noto said. "The convergence of technology will chill demand for healthcare real estate. We are going to want to stay in our homes and technology will allow us to do that," Noto said.

**Leveraging the Brand Without Breaking the Bank**

(left to right)

Frank Faust, Director of Marketing, Central Florida Health

Sean Keathley, President, Adrenaline

Elisa Worden, Principal, Gresham Smith & Partner

Mark Krejchi, Ph.D., Healthcare Manager, Wilsonart

TAKEAWAY MESSAGES

- **A company's brand is more than a logo or sign.** Faust said performance and brand are almost synonymous. "How well does an organization deliver on its promise to its customers?" he said.
- **Listen to what your customers have to say.** "It's reputation," Keathley said. "Brand is what they say about you when you leave the room."
- **You know it when you see, hear or feel it.** "Brand can be an intangible. Sometimes, it's a culture," Worden said.
- **More important than spending money** "is helping people make the right choices," Krejchi said. "Trust is necessary for loyalty." For example, he said, helping promote wellness is the right thing to do, rather than just focusing on remedying an illness.
- **The healthcare building should be functional** and serve the needs of the patients and staff. "The biggest reward," Worden said, "is not getting the cover shot on Architectural Digest."
- **Simplicity is key.** Panel members said the brand should not be complicated, but rely on a few sound principles. "It's really easy for the message to get lost if you try to do too much," Worden said.

Making Decisions at the Crucial Time – When & Why Projects Frequently Go Astray

Tim Cole, Vice President of Global Sustainability, nora systems, inc. and member of Health Product Declaration (HPD) Collaborative board of directors

TAKEAWAY MESSAGES

- **We live in a "drive-through society,"** according to Cole. Time is at a premium because, as we all know, it equates to money. "We're always looking for the solution to the problem. We aren't looking for the products we'll need 20 years from now."
- **Avoid delays. Money is tight.** Create a healthy environment. Be transparent. Those are the keys to successful completion of a project. "To me, it's about aligning your values."
- **Purchasing and operations need to team up for decisions** and manufacturers should provide innovative solutions. Without those ingredients, too many problems will crop up after opening. "Construction really hasn't changed. But the demands within the process demand it."
- **Without innovation and change,** costs will continue rising and expectations will not be met.



