

# Efficiency Checklist for Senior Living Asset Management

## Which systems or processes do you have in place?

Check each box that applies

### Assets

- ☐ A centralized list of your assets
- ☐ A way to track asset repairs and costs
- ☐ An automated reminder system for your preventive maintenance (PM) tasks
- ☐ Detailed instructions and procedures for staff to use when completing a PM task
- ☐ A data-backed approach to making asset repair or replacement decisions
- ☐ Reminders for asset warranties that are expiring soon

### Staff / Productivity

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

### Budget / Work Hours

- ☐ A system to track where and how work hours are spent
- ☐ A way to justify staffing levels if required when facing budget challenges
- ☐ A documented 2-5 year capital plan
- ☐ Reporting on how much you've spent on renovations vs. standard maintenance
- ☐ A way to help answer your CFO's questions about when an asset should be replaced and why

### Energy

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

### Contractors

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

#### 16-23 CHECKS: You're an efficiency master!

Keep doing what you're doing and finding new ways to innovate for time and resource savings.

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

**0-7 CHECKS:** Your efficiency journey is only just beginning! We would love to show you how our asset lifecycle management solutions could simplify and streamline your current workflows.

Learn how **Brightly TheWorxHub** can help you level up your efficiency score while improving compliance and enhancing resident satisfaction.