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Header 1

List View

General Information [Contact](#) [Default Values](#) [Discount](#) [Document Information](#) [Clarification Request](#)

Procurement Folder: 1053663

Procurement Type: Central Purchase Order

Vendor ID: VC0000070544

Legal Name: HORD COPLAN MACHT INC

Alias/DBA:

Total Bid: \$1.00

Response Date: 06/21/2022

Response Time: 13:06

Responded By User ID: hordcoplanmacht

First Name: Grace

Last Name: Marks

Email: gmarks@hcm2.com

Phone: 5612930272

SO Doc Code: CEOI

SO Dept: 0613

SO Doc ID: VET2200000001

Published Date: 6/8/22

Close Date: 6/21/22

Close Time: 13:30

Status: Closed

Solicitation Description: Beckley Veterans Nursing Facility
Architectural/Engineering

Total of Header Attachments: 1

Total of All Attachments: 1



Department of Administration
Purchasing Division
2019 Washington Street East
Post Office Box 50130
Charleston, WV 25305-0130

State of West Virginia
Solicitation Response

Proc Folder: 1053663
Solicitation Description: Beckley Veterans Nursing Facility Architectural/Engineering
Proc Type: Central Purchase Order

Solicitation Closes	Solicitation Response	Version
2022-06-21 13:30	SR 0613 ESR06212200000007934	1

VENDOR
VC0000070544
HORD COPLAN MACHT INC

Solicitation Number: CEOI 0613 VET2200000001

Total Bid: 1 **Response Date:** 2022-06-21 **Response Time:** 13:06:31

Comments:

FOR INFORMATION CONTACT THE BUYER

Tara Lyle
(304) 558-2544
tara.l.lyle@wv.gov

Vendor Signature X	FEIN#	DATE
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All offers subject to all terms and conditions contained in this solicitation

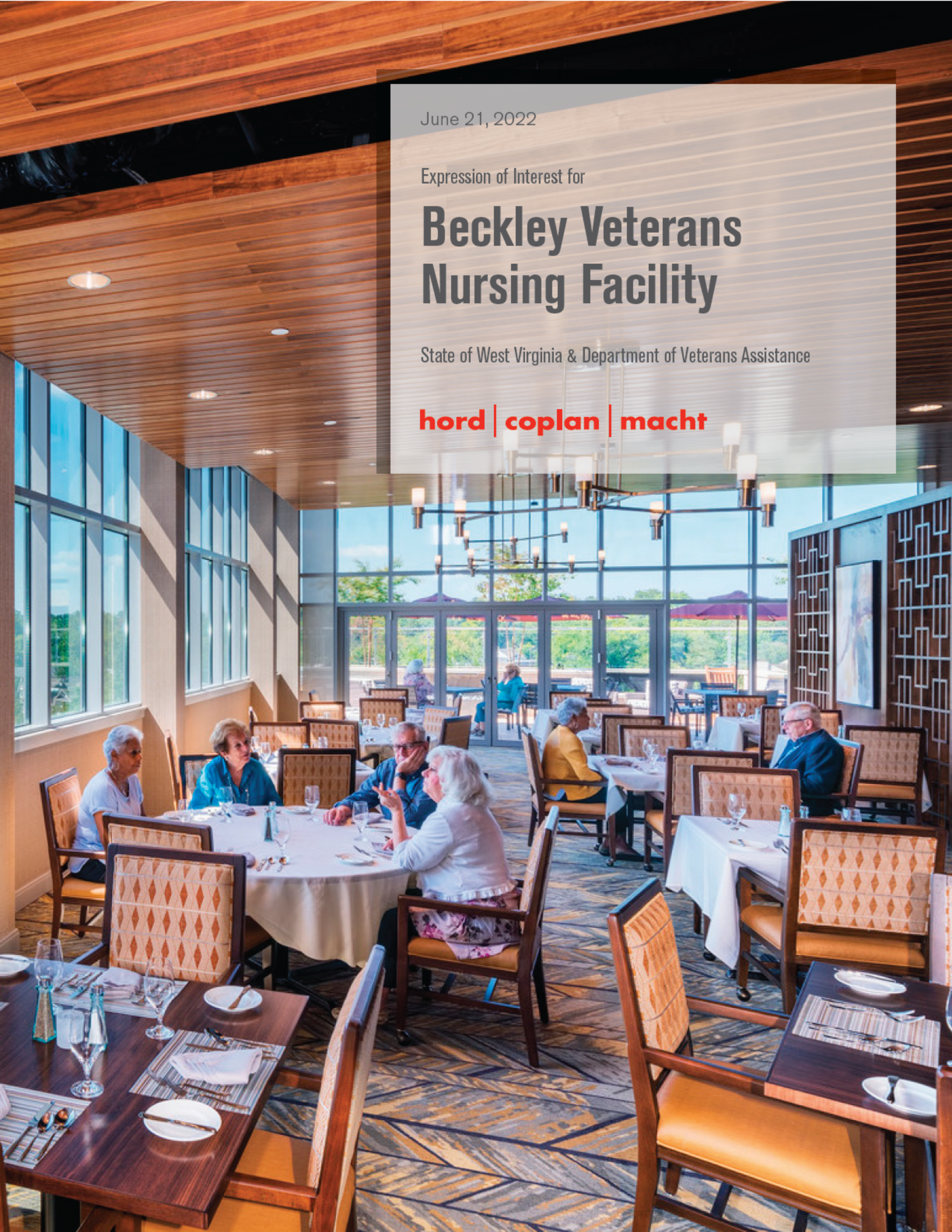
Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
1	Develop A&E EOI & Other Documents For Beckley Facility	1.00000	EA	1.000000	1.00

Comm Code	Manufacturer	Specification	Model #
81101508			

Commodity Line Comments:

Extended Description:

.



June 21, 2022

Expression of Interest for

Beckley Veterans Nursing Facility

State of West Virginia & Department of Veterans Assistance

hord | coplan | macht



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June 21, 2022

Tara Lyle, Buyer Supervisor
WV Purchasing Division
2019 Washington Street, East
Capitol Complex, Building 15
Charleston, WV 25305

RE: Expression of Interest, Beckley Veterans Nursing Facility
Solicitation No. CEOI 0613 VET2200000001

Dear Ms. Lyle,

Hord Coplan Macht is pleased to submit our Expression of Interest to the State of West Virginia and the Division of Veterans Assistance for the Beckley Veterans Nursing Facility. Our team of Architects, Designers, Planners, and Consultants understand senior care and the unique aspects of coordinating services within a large nursing home that includes memory care—we have significant experience providing planning and consulting services to organizations serving seniors throughout the United States.

A few key reasons why our team is distinctly able to serve the veterans of West Virginia by helping you create this new skilled nursing community:

- We have the **right people** to best serve this project. Our team is comprised of talented designers and consultants with decades of senior living and care experience and an understanding of your facility. Our team is led by architects with deep experience in design for seniors, a nurse practitioner and VA expert who teaches LEAN Design and is embedded in our firm, and a gerontologist with many years of experience in design for seniors with whom we have worked successfully on similar projects. They and our team will bring their unique expertise to analyze your care delivery and work with you to create an iconic building with the West Virginia VA system.
- We approach the project with the **right process**. We use Design Thinking and LEAN Principles as the foundation of our approach to planning. LEAN principles are used in evaluating and establishing efficient and effective flows that place the resident at the center of the value stream. We rapidly prototype solutions iteratively, in person, on site, to engage your team and leverage their expertise.
- We use the **right tools** to execute the project. Our iterative process is data driven to quantify and qualify current state and define future state demand and capacity and the guiding principles for design.

We look forward to helping you develop a strategy and an executable design around the new community dedicated to veteran care. Please contact me directly at 704-562-0129 or dsegmiller@hcm2.com if you have any questions or require any additional information.

Thank you very much for your consideration.

Sincerely,

HORD COPLAN MACHT, INC.



David J. Segmiller FAIA, NCARB
Principal



Department of Administration
Purchasing Division
2019 Washington Street East
Post Office Box 50130
Charleston, WV 25305-0130

State of West Virginia
Centralized Expression of Interest
Architect/Engr

Proc Folder: 1053663			Reason for Modification:
Doc Description: Beckley Veterans Nursing Facility Architectural/Engineering			
Proc Type: Central Purchase Order			
Date Issued	Solicitation Closes	Solicitation No	Version
2022-06-07	2022-06-21 13:30	CEOI 0613 VET2200000001	1

BID RECEIVING LOCATION

BID CLERK
DEPARTMENT OF ADMINISTRATION
PURCHASING DIVISION
2019 WASHINGTON ST E
CHARLESTON WV 25305
US

VENDOR

Vendor Customer Code: VC0000070544
Vendor Name : Hord Coplan Macht
Address : 1213 W Morehead St Suite 500
Street :
City : Charlotte
State : North Carolina **Country :** United States **Zip :** 28208
Principal Contact : David Segmiller, *Principal-in-Charge*
Vendor Contact Phone: 704.562.0129 **Extension:**

FOR INFORMATION CONTACT THE BUYER

Tara Lyle
(304) 558-2544
tara.l.yle@wv.gov

Vendor
Signature X

FEIN# 52-2136408

DATE 6/21/2022

All offers subject to all terms and conditions contained in this solicitation

ADDITIONAL INFORMATION

The West Virginia Purchasing Division, for the agency, the West Virginia Department of Veterans Assistance, is soliciting Expressions of Interest from qualified firms to provide professional design services to develop construction documents for a 120 bed Veterans Nursing Facility located in Beckley, WV, per the attached documentation.

INVOICE TO	SHIP TO
DIVISION OF VETERANS ASSISTANCE 1900 KANAWHA BLVD BUILDING 5, ROOM 205 CHARLESTON WV 25301 US	DIVISION OF VETERANS ASSISTANCE 1900 KANAWHA BLVD BUILDING 5, ROOM 205 CHARLESTON WV 25301 US

Line	Comm Ln Desc	Qty	Unit Issue
1	Develop A&E EOI & Other Documents For Beckley Facility	1.00000	EA

Comm Code	Manufacturer	Specification	Model #
81101508			

Extended Description:

SCHEDULE OF EVENTS

<u>Line</u>	<u>Event</u>	<u>Event Date</u>
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	Document Phase	Document Description	Page 3
VET2200000001	Final	Beckley Veterans Nursing Facility Architectural/Engineering	

ADDITIONAL TERMS AND CONDITIONS

See attached document(s) for additional Terms and Conditions

DESIGNATED CONTACT: Vendor appoints the individual identified in this Section as the Contract Administrator and the initial point of contact for matters relating to this Contract.

(Name, Title) David Segmiller, Principal-in-Charge

(Printed Name and Title) David Segmiller, Principal-in-Charge

(Address) 1213 W Morehead St Suite 500, Charlotte, NC 28208

(Phone Number) / (Fax Number) 704. 562.0129

(email address) dsegmiller@hcm2.com

CERTIFICATION AND SIGNATURE: By signing below, or submitting documentation through wvOASIS, I certify that: I have reviewed this Solicitation/Contract in its entirety; that I understand the requirements, terms and conditions, and other information contained herein; that this bid, offer or proposal constitutes an offer to the State that cannot be unilaterally withdrawn; that the product or service proposed meets the mandatory requirements contained in the Solicitation/Contract for that product or service, unless otherwise stated herein; that the Vendor accepts the terms and conditions contained in the Solicitation, unless otherwise stated herein; that I am submitting this bid, offer or proposal for review and consideration; that I am authorized by the vendor to execute and submit this bid, offer, or proposal, or any documents related thereto on vendor's behalf; that I am authorized to bind the vendor in a contractual relationship; and that to the best of my knowledge, the vendor has properly registered with any State agency that may require registration.

By signing below, I further certify that I understand this Contract is subject to the provisions of West Virginia Code § 5A-3-62, which automatically voids certain contract clauses that violate State law; and that pursuant to W. Va. Code 5A-3-63, the entity entering into this contract is prohibited from engaging in a boycott against Israel.

Hord Coplan Macht

(Company) 

(Authorized Signature) (Representative Name, Title) David Segmiller, Principal-in-Charge, 6/21/2022

David Segmiller, Principal-in-Charge, 6/21/2022

(Printed Name and Title of Authorized Representative) (Date)

704. 562.0129

(Phone Number) (Fax Number)

dsegmiller@hcm2.com

(Email Address)

HCM has reviewed the Terms and Conditions contained within this Expression of Interest and agrees, if it is the successful Vendor, to enter into a contract containing substantially similar terms and conditions as contained in the EOI, subject to a small number of industry-standard revisions that are typical for an contract of this nature.

Revised 04/01/2022



Heart and Vascular Center

01
FIRM OVERVIEW

FIRM OVERVIEW

Hord Coplan Macht was founded with the goal of providing exceptional architectural, landscape architectural, planning and interior design services to our clients. We provide these services for our senior living, multifamily/mixed-use, affordable housing, healthcare, education, commercial office, retail and historic preservation clients with award-winning expertise on a local, regional and national level. We approach each project as a unique challenge with solutions derived from an innovative, collaborative and sustainable design process. Through this process, we forge lasting relationships with our clients that extend well beyond a singular project. It is the strength of these relationships, coupled with the satisfaction of the end users, which provides the metric by which we measure our success.

Since the firm's inception in 1977, our team members have designed more than 60,000 units of senior living, multi-family, and affordable housing with a construction value of more than \$10 billion. Our portfolio comprises active adult, independent living, assisted living, memory care, and skilled nursing communities in low-, mid-, and high-rise buildings, as well as adaptive reuse, repositioning, urban infill, and podium and wrapper configurations. Combined with our interior design, planning, and landscape architecture expertise, Hord Coplan Macht's senior living practice offers a comprehensive menu of services.

CONTACT INFORMATION

David Segmiller, FAIA, NCARB

dsegmiller@hcm2.com

1213 West Morehead Street, Suite 500

Charlotte, North Carolina 28208

704.709.9065

LOCATIONS

Charlotte, North Carolina

Baltimore, Maryland

Denver, Colorado

Alexandria, Virginia

SERVICES

Architecture

Planning

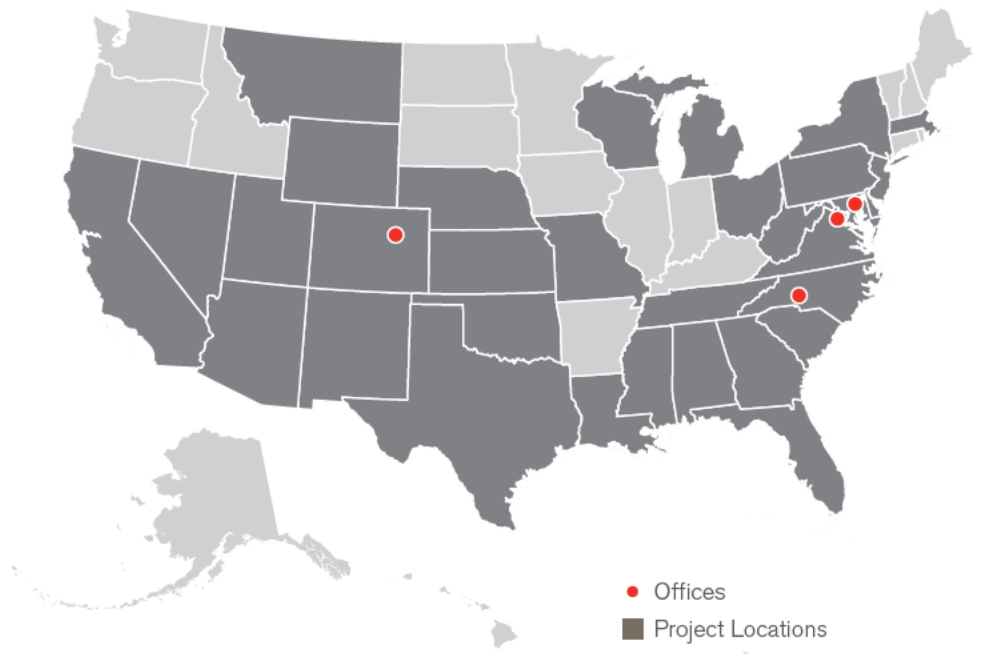
Interior Design

Landscape Design

Graphic Design

STAFF

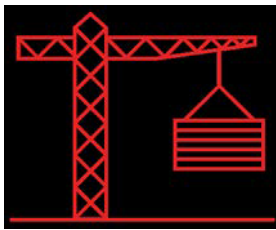
320+



SENIOR LIVING STUDIO

Hord Coplan Macht provides a multi-disciplinary approach to designing projects. Our portfolio includes a broad spectrum of senior living communities—market rate and affordable, urban and suburban, utilizing contemporary, transitional, and traditional architectural styles, as appropriate. We offer a full range of design services for senior living, including active adult, independent and assisted living, memory care, life plan communities, and skilled nursing communities.

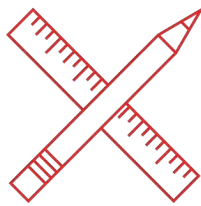
From these projects, Hord Coplan Macht has won numerous local and national awards from various awarding organizations, including: National Association of Home Builders, Senior Housing News, Environments for Aging, the American Institute of Architects, and Multifamily Executive Awards.



EXPERIENCE

Over the past 44 years, Hord Coplan Macht has completed more than \$1 billion in senior living construction on repositions, renovations, and new construction. Designing senior living environments is a full-time commitment.

The entire premise of our design is one which creates a thoughtful, functional and attractive community that exemplifies our clients' mission and ideals, and provides a place that enhances the holistic wellness of the residents who live there. We consistently produce award-winning designs. Our experienced staff regularly speak at national conferences, including Argentum, Leading Age, and the NAHB 50+ Housing Council on senior living trends.



INTERIOR DESIGN EXPERTISE

We strive to design smart, current design solutions that transcends style and trends.

We guide our clients through a tailored journey that embraces resident's needs, latest design trends, and a project's personality. The interior environment has an enormous impact on a resident's well-being. Designs should promote and encourage social engagement and living, vibrant dining choices, flexible multipurpose spaces, retail options, and the incorporation of wellness. Quality of visual representation is the basis of our passion to create unique interior experiences.



COLLABORATIVE PROCESS

Our design process is fueled by collaborative, directed thinking. Primary focus for our studio is to engage clients in the process, with a thorough understanding of the design, and how the space will look, feel and function. We strive to create inspiring design solutions that produce excitement and buy in from our clients. Our Senior Living team works with our clients to establish an integrated design process, whether it is formalized or not. We feel that all parties, sharing in the opportunities for success in a collaborative process, are important. We bring our architects, planners, interior designers together with the rest of the design team and the Senior Living stakeholders to achieve the best outcomes for all parties. Through our process improvement methodologies, we help stakeholders define, improve and streamline communities to support improved outcomes for residents, families, staff and operators.



THE LOUIS & HENRIETTA BLAUSTEN
WOMEN'S HEALTH CENTER

THE HERMAN & WALTER SAMUELSON
CHILDREN'S HOSPITAL

02 STAFFING PLAN & KEY PERSONNEL RESUMES



STAFFING PLAN

Designing senior living environments is a full-time commitment. Our Senior Living studio is comprised of 54 talented staff—architects, interior designers, and quality control and construction administrators—currently delivering projects in 15 states from four offices nationwide. We consistently produce award-winning designs. Our experienced staff regularly speak at national conferences, including Argentum, Leading Age, and the NAHB 50+ Housing Council on senior living trends.

The following pages include resumes of Key Personnel from Hord Coplan Macht and ImprovAging, the environmental gerontology consulting firm of Dr. Lorraine G. Hiatt. We commit our team and firm resources to the State of West Virginia and the Department of Veterans Assistance for the design of the Beckley Veterans Nursing Facility. Should we be selected to interview, we will supply a consultant team experienced in delivering skilled nursing communities and projects in the West Virginia, including Civil, MEP, Structural, Environmental, and Geotechnical engineers.



DAVID SEG MILLER

FAIA, NCARB
Principal-in-Charge

As Principal-in-Charge, David is directly involved in design and client relationships. He is an expert in design for an aging population and has taught and lectured extensively on the topic at both national and local conferences. He brings a unique viewpoint on the design and development feasibility of projects through his studies and teaching experience in real estate at Johns Hopkins University and the Erickson School for Aging Studies. David has served as Lead Instructor for Senior Living Development at the Erickson School and he previously worked with Johns Hopkins University and the NIC to develop the curriculum and served as faculty for the JHU/NIC Senior Housing and Care program. He has served on the LeadingAge Business Firm Advisory Committee and many of his projects for seniors' have received design awards from Design for Aging and the National Association of Home Builders. David is a former chair and founding member of the Urban Land Institute's Senior Housing Council.

EDUCATION

Master of Science in Real Estate, Johns Hopkins University

Master of Architecture, North Carolina State University

Bachelor of Environmental Design, Miami University

PROFESSIONAL LICENSES

Registered Architect: Pennsylvania, North Carolina, South Carolina, Florida, Georgia, Louisiana, Massachusetts, Maryland, New York, Oklahoma, Virginia, Illinois

Board Certified by the National Council of Architectural Registration Boards

PROFESSIONAL ACTIVITIES

The Urban Land Institute, Full Member, ULI Senior Housing Council - Council Chair 2008-2010, Assistant Chair 2005-2007

Assisted Living Facilities Association of America - ALFA - Conference Program Committee

American Association of Homes and Services for the Aging - AAHSA

SELECT EXPERIENCE

Pennsylvania Department of General Services Hollidaysburg Veterans' Home New Community Living Center *Hollidaysburg, Pennsylvania*

- New 200-bed state-of-the-art destination center of excellence that will achieve improved quality of life for residents, increased operational efficiency for HVH staff, and decreased life cycle costs for the Department of Military & Veterans Affairs. The campus and environments will allow for independence, wellness, support social interaction and activities, while providing dedicated spaces for privacy or family gatherings. The new consolidated community centralizes food services, administration, and support services.

Veterans Administration, W.G. Hefner Medical Center* *Kernersville, North Carolina*

- This 325,000 sf new Outpatient Health Care Center will consist of an array of specialty clinics, diagnostic support & user amenities. The scope includes OR's, MRI, Cardiac Cath Labs, Nuclear Medicine, MRI, CT and general radiology, a 17 chair dialysis clinic is also included. Facility has been designed to attain a LEED (for Healthcare) Gold certification.
- David served as Managing Principal while with Perkins Eastman.

Southminster *Charlotte, North Carolina*

- Creation of a master plan for expansion and replacement of an existing Life Plan Community. The process included extensive charrettes with stakeholders from the staff, board and residents and included replacement of 60 beds of skilled nursing and 24 Assisted Living units in a new building and new Independent Living products to make the project viable for this major non-profit sponsor. \$120 Million dollar project completing in 2020.
- David served as Principal-in-Charge while with Perkins Eastman.

The Village at Suffield Meadows *Warrenton, Virginia*

- New Assisted Living and Memory Care building in Warrenton, Virginia for Fauquier County Health System.

The project was design using Planetree principles per the hospitals care model, and incorporated activities functions for the existing Active Adult community in which it is located.

- David served as Principal-in-Charge/Lead Designer while with FreemanWhite.

Zebulon Park Skilled Nursing *Macon, Georgia*

- New for-profit skilled nursing home with in and outpatient rehabilitation, aimed at keeping the beds affordable within the Georgia state regulation for Medicaid at 700 gross square feet per bed in all private rooms.
- David served as Principal-in-Charge while with FreemanWhite.

Covenant at South Hills *Pittsburgh, Pennsylvania*

- New Life Plan Community in Pittsburgh, Pennsylvania with a full continuum of care, including Independent Living apartments, Assisted living and skilled nursing beds.
- David served as Principal-in-Charge while with CS&D.

Lambeth House *New Orleans, Louisiana*

- New high-rise Life Plan Community next to the Mississippi River levee in the uptown area of New Orleans. The design incorporated innovative clustered nursing neighborhoods within the high-rise footprint, an early small house model.
- Designed with Dr. Lorraine Hiatt.
- David served as Project Manager/Lead Designer while with CS&D.

The Knolls of Oxford *Oxford, Ohio*

- New Life Plan Community including all levels of care and including multiple levels of memory care based on acuity from a social model to a more skilled care model to accommodate the various stages of life with Alzheimer's.
- David served as Principal-in-Charge/Lead Designer while with CS&D.



KURT THOMPSON

RA, NCARB
Project Manager

Kurt has more than 25 years of experience with a diversified background in senior living, housing, healthcare, allied health, higher education, and K-12 projects. He has a strong background in project management, including oversight of the project team, direct communication and coordination with clients, and the overall delivery of quality architectural services. Kurt's strong ability in collaborative programming and conceptual design of complex projects aids in delivering functional, aesthetic, budget, and schedule project objectives.

EDUCATION

Bachelor of Architecture, Virginia
Polytechnic Institute & State University,
1983

PROFESSIONAL LICENSES

Registered Architect: North Carolina,
South Carolina, Virginia

Board Certified by the National Council of
Architectural Registration Boards

SELECT EXPERIENCE

Pennsylvania Department of General Services Hollidaysburg Veterans' Home New Community Living Center *Hollidaysburg, Pennsylvania*

- New 200-bed state-of-the-art destination center of excellence that will achieve improved quality of life for residents, increased operational efficiency for HVH staff, and decreased life cycle costs for the Department of Military & Veterans Affairs. The campus and environments will allow for independence, wellness, support social interaction and activities, while providing dedicated spaces for privacy or family gatherings. The new consolidated community centralizes food services, administration, and support services.

United Methodist Manor of the Pee Dee *Florence, South Carolina*

- Repositioning of an existing LPC community that offers 64 new assisted living apartments, 12 new memory care rooms, and six new skilled nursing rooms, as well as a destination amenity courtyard with a gazebo and trellis. The project expands skilled nursing, memory care, and creates a new Assisted Living building. The design also creates a new amenities gallery around the main existing courtyard to better organize the CCRC and link amenities for the ease of use by the existing and future residents. The first phase of this project is the outcome of a long range Master Plan for the CCRC to include wellness and additional dining venues in the future.
- Kurt served as Project Manager while with Perkins Eastman.

Silverado Memory Care *Alexandria, Virginia*

- Design of a 66-room memory support residence adjacent to and complementary to an existing skilled nursing community. Design incorporates two Small Houses with 11 memory support rooms per floor and shared amenities. The design allows for 2 staff per neighborhood, and public space and administration is located in a foreground wing of the building. Parking and Back of House services are below grade, and food movement is accommodated from a below ground kitchen through elevators into each individual neighborhood.
- Kurt served as Project Manager while with Perkins Eastman.

Branchlands Assisted Living & Memory Care *Charlottesville, Virginia*

- A new three-story building providing assisted living and dementia care on an existing CLC campus, north of Charlottesville, Virginia. The facility includes 36-beds of assisted living over two floors and another floor with two 12-bed dementia units. Amenity spaces are located on the main entry level including dining, library, beauty parlor, and media rooms.
- Kurt served as Project Manager while with Perkins Eastman.

Broadview at SUNY Purchase College Life Plan Community *Purchase, New York*

- Master plan and new construction of a 220-unit Life Plan Community on a 40-acre site on the Purchase College campus, including health and wellness, influence on the landscape design, multiple amenity spaces, as well as a new "Learning Commons" that will act as the link between the college and the senior learning community. Broadview also offers 36 308-sf private memory care suites in a neighborhood design, and offers an enclosed therapeutic garden.

Delaware Home for the Chronically III *Smyrna, Delaware*

- New construction of a new \$50 million, 150-bed skilled nursing community. The project will include amenity spaces for multi-purpose activities and visitation, dining hall and kitchen, physical therapy and exercise spaces, nurse stations, administrative offices and training areas, and a chapel. The new community will feature outdoor amenities, including courtyards, walking trails, and a pavilion.



DUNCAN WALKER

AIA, LEED AP
Design Principal

Mr. Duncan Walker has over 35 years of experience as an architect. His projects have included a wide range of types from a golf resort in Bali, Indonesia to the repositioning of a landmark mixed use project in the Coconut Grove neighborhood of Miami. For the past 20 years, Duncan has concentrated in residential and mixed-use projects with a strong focus on Senior Living. He has developed an extensive understanding of designing for seniors and has been active in the national Senior Living industry.

Duncan believes that high quality design can add significant value to projects without increasing cost. He is typically the primary designer for the projects he works on, and has brought memorable aesthetics and a strong sense of place to the large number of projects he has designed. He has developed a method of working almost entirely in 3 dimensions in the very early stages of design. This allows clients to much more easily understand and decide the issues that form the basis for the finished building.

EDUCATION

Master of Architecture, Syracuse University, 1986

Bachelor of Arts, Art History, Vassar College, 1982

PROFESSIONAL LICENSES

Registered Architect: Maryland

LEED Accredited Professional

AWARDS

American Institute of Architects (AIA)
Design for Aging, Merit Award 2019 for Encore Mid-City

American Institute of Architects (AIA)
Design for Aging, Merit Award 2007 for Marsh's Edge

American Institute of Architects (AIA)
Design for Aging, Merit Award 2005 for Saint James Place

PRESENTATIONS

Together We Care, 2022, Topic: You Don't Have to Outrun the Bear - Design Strategies for Competitiveness.

Environments For Aging 2007, Topic: Community Integrated Senior CCRCs: Brickstone

AAHSA National Fall Conference 2005, Topic: Senior Campus Repositioning

AAHSA National Fall Conference 2003, Topic: The New Urbanist CCRC

Environments For Aging 2012, Topic: Community Integrated Senior CCRCs

SELECT EXPERIENCE

Pennsylvania Department of General Services Hollidaysburg Veterans' Home New Community Living Center *Hollidaysburg, Pennsylvania*

- New 200-bed state-of-the-art destination center of excellence that will achieve improved quality of life for residents, increased operational efficiency for HVH staff, and decreased life cycle costs for the Department of Military & Veterans Affairs. The campus and environments will allow for independence, wellness, support social interaction and activities, while providing dedicated spaces for privacy or family gatherings. The new consolidated community centralizes food services, administration, and support services.

Stella Maris Skilled Nursing Expansion *Towson, Maryland*

- HCM was hired to assist with the planning and CON process for a new addition to Stella Maris skilled nursing community. The scope included evaluating the existing conditions of the facility based on bed count and location, room sizes and suite layouts. The CON submission included a schematic design by HCM of a new addition that relocated 60 of the existing beds out of the existing Pangborn building and into the new building. HCM then designed of a new four-level addition and renovation of the existing Shehan Wing. The new construction result in a 60-bed rehabilitation or "transitional care" unit and shell space on the third floor to accommodate future updates and upgrades to aging facilities.

Frasier Meadows Life Plan Community Expansion & Renovation *Boulder, Colorado*

- Design for 98 new independent living residences, a Center for Healthy Aging, an Arts and Education Center, new and renovated dining venues including the 5th floor Hill Top Lounge overlooking the Flatiron Mountains. Frasier is the first CCRC designed to meet the WELL Building Standard™. In addition,

Hord Coplan Macht was hired to refine, and ultimately implement revisions to an existing Master Plan, and coordinate with Frasier's leadership to proactively involve the Frasier residents. HCM and Frasier's leadership conducted separate presentations for residents of each floor of the community.

- HCM also participated in continuous and comprehensive follow up with interested residents, including revisions as the Master Plan was finalized for initiation of the entitlement process.

Roland Park Place Life Plan Community Expansion & Renovation *Baltimore, Maryland*

- Master plan, expansion, and renovation to the only Life Plan Community located in Baltimore City. The project included the conversion of Nursing to two 13-suite Memory Care Households with two secured Gardens, renovation of 14 suite Long Term Care Households and 16 suite Short Term Rehab Households, and comprehensive renovations and expansions to multiple dining venues and fitness amenities. Additionally, 60 new Independent Living units, a new 200-seat Arts & Education Center, and a 150-car under building parking structure expands the current offerings of the community.

Sacred Heart Intermediate Long-Term Care Residence *Hyattsville, Maryland*

- HCM was hired to design a replacement nursing community serving 44 residents and including four households of 11 residents each. Each household has its own Living/Activity Room and will adjoin a common Dining Space served by a Country Kitchen/Pantry. Additionally, all four households are arranged to define a landscaped courtyard. Other commons amenities including a multipurpose room, Rehab & Therapy, salon, and a chapel.



TRACEY L. GRAHAM

DNP, MSN, MSM, APRN, FNP-C, CEN
Principal, LEAN Consultant

Tracey Graham is a Senior Healthcare Specialist. She has a Master's in Business Management and Advanced Practice Nursing; certified as a Family Nurse Practitioner with ACLS, PALS, CPR/BLS, Emergency, and Flight Nursing. She has extensive work experience within the Canadian and US Federal Governments and Canadian Armed Forces.

With extensive experience as adjunct professor, advanced clinician and hospital administrator, Tracey understands the operational needs, infrastructure and technology demands required to provide effective and efficient care and the academic environments requirements for interprofessional collaboration and practice. She has been a program and project manager and has led facilities and individuals in change management and transitional planning from the front line through all departmental levels with responsibilities that include management of National, multi- million dollar capital expenditures.

Tracey has held several academic positions, lectured internationally and is currently an adjunct instructor in LEAN for Healthcare at the University of Tennessee.

She is committed to ensuring care is delivered across care continuum with purpose and at the highest standards of care; serving as a clinical and operational strategy expert for master planning and service line integration and redesign.

Her vast clinical experience is coupled with a keen insight into the International Organization for Standardization (Certified ISO 9001 Auditor), LEAN and TQM principles, Clinical best practices and in international accreditation standards. She is a strategist with knowledge and deep understanding of the clinical, operational and practice environments and the requirements necessary to provide the best infrastructure and process for quality outcomes.

EDUCATION

Doctorate Nursing Practice –Change Management with Focus in Systems Redesign & Quality Improvements, 2019

Master's Science Degree Business - Leadership and Organizational Change Management, Troy State University, Pensacola, Florida, 2003

Master's Degree Nursing - Advanced Practice Nursing: Acute and Family Care, University of South Alabama / Master's Degree Nursing, Advanced Practice, Mobile, Alabama, 2006

Bachelor's Degree Health Sciences: Nursing - Charles Sturt University, NSW, Australia, 1996

Registered Nursing Diploma - Health Sciences, Centre, Winnipeg, Manitoba, 1987

Lean for Healthcare, University of Tennessee: College of Executive Education, Knoxville, Tennessee, 2013

PROFESSIONAL LICENSES

APRN # [REDACTED] Florida Board of Nursing

APRN # [REDACTED] (Licensed Nurse Practitioner), Virginia Board of Nursing

SELECT EXPERIENCE

Pennsylvania Department of General Services Hollidaysburg Veterans' Home New Community Living Center *Hollidaysburg, Pennsylvania*

- New 200-bed state-of-the-art destination center of excellence that will achieve improved quality of life for residents, increased operational efficiency for HVH staff, and decreased life cycle costs for the Department of Military & Veterans Affairs. The campus and environments will allow for independence, wellness, support social interaction and activities, while providing dedicated spaces for privacy or family gatherings. The new consolidated community centralizes food services, administration, and support services.

Bon Secours Mercy Health, Roper Hospital *Charleston, South Carolina*

- Campus Master Plan - Clinical and Operational Strategist Needs Assessment Lean Design Consultant & Medical Planner

Greater Baltimore Medical Center, Promise Project *Towson, Maryland*

- 3-story 107,000 sf addition creates a New Main Entrance with two 30-bed medical surgical units. The project includes patient and family amenities to support the entire hospital
- Lean Design, Operational and Clinical Planner

Veterans' Health Administration CBOC Denver, Design-Build *Denver, Colorado*

- Clinical and Operational Strategist. SEPS Specialist, Lean Design Consultant & Medical Planner

Veteran's Affairs Medical Center Philadelphia *Philadelphia, Pennsylvania*

- Master Plan and Academic / Research Integration-Operational and Clinical and Operational Strategist for Operational Readiness and Transition
- Served as Clinical and Operational Strategist while employed by Stantec

Ascension Health, Acute Care Clinic & Radiology Department Design *Washington, DC*

- Clinical and Operational Strategist, Lean Design Consultant, Medical Planner
- Served as Clinical and Operational Strategist while employed by Stantec

Winnipeg Regional Health Authority *Winnipeg, Canada*

- Pediatric Cardiology Clinic
- Clinical and Operational Strategist – Clinical and Operational Analysis & Needs Assessment
- Lean Design Consultant – Medical Planner Clinic Redesign
- Served as Clinical and Operational Strategist while employed by Stantec

Hamad Medical Corporation *Doha, Qatar*

- New Design Medical City - Neurosciences Institute, Ambulatory Care, Tertiary Center, Diagnostics & Treatment Centers
- Clinical Services Lean Design & Capacity Planning Lead
- Staffing and Schedule Analysis & Planning
- Served as Clinical and Operational Strategist while employed by Stantec



DR. LORRAINE G. HIATT

Ph.D

Environmental Gerontologist / Memory Care Consultant

EDUCATION

Ph.D. Graduate Center, City University of New York, Environmental Psychology, 1985

B.S. Cornell Univ., 1969, M.A. Cornell University, 1972 both Design and Environmental Analysis

AWARDS

2019 Outstanding Woman in Design for Aging EFA

Dr. Lorraine G. Hiatt, Ph.D., is an environmental gerontologist with 50 years of experience in planning, post-occupancy research, and design consultation. She has completed on-site research and design consultation in 48 states, and has completed 800 projects with more than 100 different architectural firms throughout the U.S. Her works have been featured in design publications including EFA, Leading Age, and Argentum. Dr. Hiatt has presented at the National Association of State Veterans Homes, National and Pennsylvania LeadingAge, ACHA, AIA, ASID, Alzheimer's Association, SAGE and Environments for Aging. Some of her recent projects include Allegheny Senior Services, Affordable Housing, Philadelphia; St. John's on the Lake, Milwaukee; Mease Manor Memory Care, Florida; State Veterans Community Living Center, Nevada and Rhode Island; and Veterans Homes and Parker in Monroe, New Jersey.

For this projects, Dr. Hiatt will work within scope and to results fitting each Sponsor's "Givens," Project Criteria and Work Plan including documents/plans prepared to date as well as any issues to be resolved. She will provide images and results to expedite desired outcomes and the "best practices" for this project and location. In relation to LEAN Design, Dr. Hiatt will participate in: new findings on staff and resident safety (i.e., movement, Activities of Daily Living, and memory/behavioral care); Design Details: resident room/bathroom innovations (including double occupancy uses); features optimizing memory; falls reduction, streamlining care and services; Application of selected, anonymous MDS data on your prospective residents to address combinations of memory/physical care and mobility/ADL assists; Tools for staff to test their "staffing patterns" on present and any proposed plan variations; Examples of layouts, equipment and storage design and efficient "stealth" service routing re: COVID; Nursing staffing by shift for your business office to use in modeling/anticipating operations' costs in conjunction with their capital benchmarks; Expedited review: virtual planning; 2 and 3 dimensional mock-ups.; Approvals (FDVA, State, local Authorities Having Jurisdiction, etc.), and; Opportunities for design to welcome Veterans' lifestyles, interests and attract community/family support.

SELECT EXPERIENCE

Pennsylvania Department of General Services Hollidaysburg Veterans' Home New Community Living Center

Hollidaysburg, Pennsylvania

- New 200-bed state-of-the-art destination center of excellence that will achieve improved quality of life for residents, increased operational efficiency for HVH staff, and decreased life cycle costs for the Department of Military & Veterans Affairs. The campus and environments will allow for independence, wellness, support social interaction and activities, while providing dedicated spaces for privacy or family gatherings. The new consolidated community centralizes food services, administration, and support services.
- Experience with Hord Coplan Macht.

The Households at Levindale

Baltimore, Maryland

- Levindale is one of the first long-term care centers in the State of Maryland to employ the "small house" or "neighborhood" philosophy, which helps foster interaction and engagement by bringing residents into vibrant, social common spaces, both within and outside the building.
- Organized the community into living areas identified as households, neighborhoods, and town centers including both visible and hidden support spaces.
- As part of the strategic plan to improve skilled nursing and accommodate growth at Levindale Hospital, Hord Coplan Macht was hired to develop a master plan to revitalize the existing nursing home campus. The major program element of the master plan was the addition of two new buildings, housing a total of 172 resident rooms grouped into households of 14 private rooms each. Following the addition, the existing nursing home

will also be transformed into a neighborhood-based facility, by providing additional common space and all private rooms, thus reducing the overall number of residents from 172 to just 70 in the existing building.

- Phase One, a six neighborhood, skilled-nursing expansion and a 6,000 sf town center serves the surrounding community.
- Experience with Hord Coplan Macht.

Ardie R. Copas FL State Veterans Home

Port St. Lucie, Florida

- Environmental Gerontologist with RLFAE, on LEAN Design of VA CLC. We facilitated user input/meetings on Veterans' characteristics; design details matched to effective staffing coverage, improved room/bathroom safety, social, dining; optimized sight and walking distances, incorporated data in detailed space lists with construction team. Used full scale 2-d mock-up room/bathroom and detailed space lists to expedite digital design details and achieve State Health Department and Federal VA approvals, including bathrooms exceeding ADA and Veterans' specific lifestyle, care needs.

Northern Nevada Veterans Home

Sparks, Nevada

- Environmental Gerontologist including staff visioning for care patterns, food service and optimized footprint/capital, and operating costs. Introduced design details to encourage movement, memory, and safer bio-care while celebrating Veterans' Lives/Service. Documentation/negotiations for FDVA and State approvals (i.e., improved bathroom/shower safety).
- 196 Beds
- Open 2019

HORD COPLAN MACHT



MedStar Franklin Square
Medical Center





03 PROJECT EXPERIENCE & REFERENCES



Hollidaysburg Veterans Home Community Living Center

PENNSYLVANIA DEPARTMENT OF MILITARY & VETERANS AFFAIRS

Hollidaysburg, Pennsylvania

170,000 sf

\$75 million

200 beds

2023 completion

LEAN design

Samuel M. Dunkle
Commandant Lieutenant
Colonel, United States Army
- Retired)

PA Department of Military
and Veterans Affairs |
Hollidaysburg Veterans
Home

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Hord Coplan Macht and Dr. Lorraine Hiatt are providing planning and design services for the new Hollidaysburg Veterans' Home (HVH) Community Living Center. HVH is the largest community within the Pennsylvania system, with 424 beds and a 365-acre campus with a robust history and infrastructure that dates to 1904. This pilot project envisions a design that reduces the number of beds to 200, consolidating care within a single 170,000 sf state-of-the-art destination center of excellence that will achieve improved quality of life for residents, increased operational efficiency for HVH staff, and decreased life cycle costs for the Department of Military & Veterans Affairs. The campus and environments will allow for independence, wellness, support social interaction and activities, while providing dedicated spaces for privacy or family gatherings. The new consolidated community centralizes food services, administration, and support services.

The project is being completed through a LEAN Integrated, Target Value Design that serves to surpass expectations in process and design solutions. This requires a robust project management methodology that is embedded in LEAN principles and design thinking, and is focused on the end users defined value. Stakeholder engagement activities were completed at every level, from residents, to support staff, to facility management, giving users a hand in the design.

The project was submitted for permitting in March 2022, and is expected to move into construction as early as Summer 2022.





Stella Maris Skilled Nursing Expansion

MERCY HEALTH SERVICES
Towson, Maryland

78,000 sf

\$23 million

60 beds

2020 completion

Master planning

Judith Weiland
Senior VP, Capital Planning
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jweiland@mdmercy.com

Stella Maris is a nonprofit, comprehensive care facility, sponsored by the Sisters of Mercy, and an affiliate of Mercy Health Services. For more than 60 years, Stella Maris has offered a comprehensive range of health and residential services for the care of the elderly from retirement through the end of life.

HCM was hired to assist with the planning and CON process for a new addition to Stella Maris. The scope included evaluating the existing conditions of the facility based on bed count and location, room sizes and suite layouts. The CON submission included a schematic design by HCM of a new addition that relocated 60 of the existing beds out of the existing Pangborn building and into the new building.

Hord Coplan Macht was next tasked with the design of a new four-level addition to the existing Stella Maris comprehensive care facility. Included in the design is a basement and three stories above ground. Renovation of the existing Shehan Wing will accommodate this new addition. The new construction will consist of approximately 75,375 square feet, and the renovation work in the Shehan Wing will involve approximately 5,106 square feet of space. Upon completion, the new construction will result in a 60-bed rehabilitation or "transitional care" unit and shell space on the third floor to accommodate future updates and upgrades to Stella Maris's aging facilities.





Charlestown Continuing Care Retirement Community Wilton Overlook Skilled Nursing

ERICKSON LIVING MANAGEMENT
Catonsville, Maryland

171,000 sf

\$49 million

192 beds

2020 completion

Master planning

Dawn Yeager
Senior Director of
Development
410.402.2040
dawn.yeager@erickson.com

The design for the Charlestown Continuing Care Community is based on providing resident-focused care in a home-like atmosphere. Hord Coplan Macht completed master planning services for the campus, which resulted in repositioning buildings on campus, as well as the design and construction of Wilton Overlook, the \$49 million, 171,000 sf skilled nursing and memory care building.

Completed in October 2020, Wilton Overlook features 192 beds and was carefully designed to evoke a residential feel, with a strong focus on providing a range of activity spaces to encourage resident engagement and independence in a stimulating, nurturing, and amenity-rich environment. Suites feature private bedrooms and full baths and are located in close proximity to dining areas. Apartment living space, between 300 and 720 sf, exceeds industry standards. Amenities including multi-purpose, activity and programming spaces, a theater, living rooms, a salon, conference rooms, a games lounge, a library and a card game room, are available for use by all continuing care residents, who can also enjoy an enclosed outdoor courtyard. Common areas feature large amounts of natural light and have been thoughtfully configured to maximize the delivery of person-centered care throughout the building.





Levindale Small House Conversion Master Plan & Neighborhood One

THE HOUSEHOLDS AT LEVINDALE
Baltimore, Maryland

256,000 sf

\$22.5 million

172 beds

2011 completion

Master planning

Peter Arn
Vice President, Enterprise
Development
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Levindale is one of the first long-term care centers in the State of Maryland to employ the "small house" or "neighborhood" philosophy. Working with Dr. Loraine Hiatt, Levindale is organized into community living areas identified as neighborhoods, similar to the Community Living Centers planned for the Veterans Administration. As part of the strategic plan to improve skilled nursing and accommodate growth at Levindale hospital, HCM developed a master plan to revitalize the existing nursing home campus. The program elements of the master plan were the addition of two new buildings and transformation of the existing nursing home buildings into a neighborhood-based communities over four phases.

Neighborhood One was the first major program element following the Levindale's master plan. Phase one was a six neighborhood, skilled-nursing, addition and a 6,000 sf town center serves the surrounding community, housing a total of 172 resident rooms grouped into households of 14 private rooms each. The addition allows the existing skilled nursing residences to be transformed into a neighborhood-based community, providing additional common space and all private rooms, thus reducing the overall number of residents from 172 to just 70 in the existing building.



Typical Household Plan





Charlestown Continuing Care Retirement Community Caton Woods Assistant Living

ERICKSON LIVING MANAGEMENT
Catonsville, Maryland

127,000 sf

\$24 million

104 beds

2016 completion

Master planning

The design for the Charlestown Continuing Care Community is based on providing resident-focused care in a home-like atmosphere. Hord Coplan Macht completed master planning services for the campus, which resulted in repositioning buildings on campus, as well as the design and construction of the \$24 million, 127,000 sf Caton Woods building.

At the 104-bed Caton Woods, the building layout focuses on reducing the amount of residents in a typical neighborhood and clustering rooms to account for the proper staffing ratios. The traditional nurse's station has been removed and instead, touchdown and staff areas will be provided throughout. Connecting the neighborhoods is a vertical towncenter anchored by the ground floor that contains the building's shared amenities. These amenities mimic those of a typical town center: a chapel, gym, salon, spas, art rooms, movie theater and café. These features allow a close and convenient area for residents to socialize outside of their immediate neighborhood.

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Senior Director of
Development
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Life Plan Community Expansion & Renovation

ROLAND PARK PLACE
Baltimore, Maryland

190,000 sf

\$40.5 million

2021 completion

Master planning

Tony Teague
Owner's Development
Representative
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Roland Park Place is the only Life Plan Community located within Baltimore City. This high-rise CCRC, located on an 8 acre urban site, opened in 1985, pre-dating Assisted Living. In 2002, it was added to by converting Independent Living to 40 Assisted Living Units, a new Café, and a Fitness Center with Indoor Pool. During the time since, many of the Independent Living Units have been combined to improve marketability.

Hord Coplan Macht master planned a major community-wide reinvention and expansion to include the following:

- Conversion of Nursing to two 13-suite Memory Care Households with two secured Gardens
- Renovation of 14 suite Long Term Care Households and 16 suite Short Term Rehab Households
- Addition of 60 new Independent Living Apartments
- Comprehensive Commons Renovations including the creation of multiple dining venues including, Market Café, Bistro, Pub and Formal Destination Dining / Private Dining
- Expanded Fitness facilities
- Improved Administrative, Marketing, and Meeting spaces
- Dedicated Movie Theatre space
- Right-sized Arts/Crafts areas
- New 200 seat Arts and Education Center
- New 150 Car under building Parking Structure

PHASE I - FIRST FLOOR MEMORY CARE
A1-3





Broadview at SUNY Purchase College

LCS DEVELOPMENT
Purchase, New York

232,500 sf

\$200 million

220 units

2022 completion

Master planning

Hord Coplan Macht planned and design a new Senior Learning Community on the campus of Purchase College, State University of New York. In addition to planning of the 40 acre site, Hord Coplan Macht will design a full continuing care retirement community including health and wellness, influence on the landscape design, multiple amenity spaces, as well as a new "Learning Commons" that will act as the link between the college and the senior learning community.

The goal is to provide a facility in which the residents are actively engaged in many aspects of the college. Residents will be able to participate in activities of the renowned Performing Arts Center and Neuberger Museum of Art. The College also anticipates residents participating in academic activities and utilizing the other facilities of the college, including its athletic facilities, walking paths and the extensive campus grounds. The link between the College and senior population will provide support to the younger students in the form of mentoring, tutoring, guest lecturing, and other activities.

Broadview also offers 36 308-sf private memory care suites in a neighborhood design, and offers an enclosed therapeutic garden.

Joel Bleeker
Director of Design
LCS Development
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SUMMARY OF EXPERIENCE WITH LEED & SUSTAINABLE DESIGN



WELL Certified Frasier Meadows



LEED Gold Brightview Woodmont

Hord Coplan Macht has substantial experience with sustainability and well-being rating systems with 161 LEED projects totaling 16.4 million square feet which includes 98 certified projects (9.3 million square feet). Certifications range from Certified to Platinum with about 50% of projects achieving Gold. We have worked on 3 WELL building standard projects - two of our HCM offices, and the first WELL - multifamily senior living pilot project. WELL is the “first standard of its kind that focuses solely on the health and wellness of building occupants” and evaluates the building design and operation based on the ten concepts of: Air, Water, Nourishment, Light, Movement, Thermal Comfort, Sound, Materials, Mind and Community. We have found that linking the processes of LEED, WELL and Zero Energy produces the best approach to a holistic building design.

All of our design projects are tracked for the AIA 2030 Commitment, which has a goal of obtaining carbon neutrality by the year 2030 and our projects have won numerous awards from USGBC, AIA, and ULI. We have worked on the second largest K-12 project in the world and the only one in Baltimore and Maryland, to be certified Platinum under the LEED for Schools v3 rating system and a project listed in the top 15 Most Impressive Environmentally Friendly University Buildings in the world.

Hord Coplan Macht has a focused team of architects who are LEED Accredited Professionals - currently 50% of the office and many hold other green accreditations including WELL, SITES, Eco-Districts, Green Globes, NAHB -National Association of Home Builders, and SEED -Social Economic and Environmental Design. Many are involved with board and memberships including USGBC - MD, CO, NCR; AIA Design & Health Leadership Group; AIA DC Design

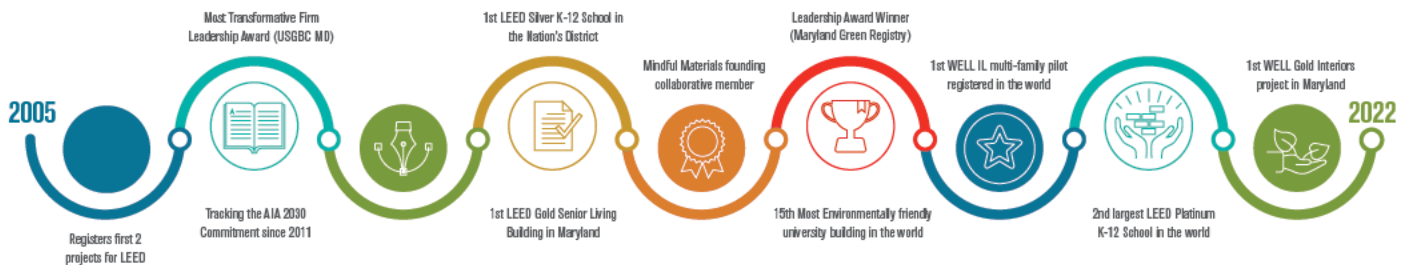
+ Well-being Committee; MD Green Building Council; Baltimore Sustainability Commission, and Denver 2030 District. Many also volunteer with AASHE, the Association for the Advancement of Sustainability in Higher Education, Green Schools Network, AIS, the ACE Mentor program and the Green Apple Day of Service. Well designed, sustainable, and healthy buildings and communities benefit the end users over the life of the project and Hord Coplan Macht believes in a tailored approach to each project. The success of any project is based on an integrative design approach with the entire team, strategies that are integrated early, balanced with economic feasibility and value for the project. Sustainability and stewardship enhances buildings and sites, and ultimately can improve performance for human health and well-being, the environment, and your investment. Hord Coplan Macht's team can offer an innovative and collaborative design solution for your project by integrating strategies that balance high performance and environmental responsibility with financial investment, and also a design that enhances health and well-being, and creates a beautiful building and site environment for the occupants.

Sustainability at Hord Coplan Macht

16.4 Million Sq Ft of LEED Projects (**9.3 Million** Sq Ft Certified)

50% LEED APs

#27 Top 100 Green Design Firm (ENR, 2021)



People



Accreditations

LEED AP - 50%
WELL AP
Green Globes Professional
SITES AP
Ecodistricts AP
CPHC, Certified Passive House Consultant
EMIT

Fitwell Ambassador
NAHB
Earthcraft
Eco-Chairette
MD Green School Leader
Climate Reality Leader

Involvement

USGBC - MD, CO, MCR
AIA Design & Health Leadership Group
AIA DC Design + Well-being Committee
Baltimore Sustainability Commission
MD Green Building Council
Sustainable Design Leaders Group
AASHE

Outreach

Project Clean Stream
Green Apple Day of Service (since 2012)
Bike to Work Day

Relevant Sustainable Design Experience:

LEED Certified

- Green Street Academy Renovation, Platinum
- Brightview Grosvenor, Gold
- Brightview Woodmont, Gold
- The Wren, Gold
- DC Scholars Public Charter School, Gold
- DC Bilingual Public Charter School, Gold
- DC Public Schools, Murch Elementary School, Gold
- DC Public Schools Kimball Elementary School, Gold
- The Kelvin + Envy, Gold
- Frasier Meadows Independent Living Building, Silver
- Avalon Harbor East, Silver

- The Bexley, Silver
- The Denizen, Silver
- Gables Old Town North, Silver
- Bainbridge Federal Hill Apartments, Gold
- The Haven, Silver
- CODA on H, Silver
- New Shiloh Village II, Silver
- The Galvan, Silver
- 672 Flats, Silver
- The Perry, South Building, Silver
- The Perry, North Building, Silver
- City Arts II, Silver
- Remington Row, Silver

WELL Certified

- Frasier Meadows Independent Living Building
- Hord Coplan Macht, Baltimore Office
- Hord Coplan Macht, Denver Office





04
PROJECT &
GOALS

PROJECT & GOALS

OUR PROJECT APPROACH IS BASED ON:



Project Methodology

Our integrated project delivery (IPD) methodology is founded in LEAN Principles and Design Thinking, incorporating the Right Team of designers and consultants, with the *Right Process, Technology and Proven Tools* for success. The use of the LEAN principles with design thinking offers an integrated methodical process, that begins with current state understanding through discovery. An Informed, synchronized and integrated Design team allows for measurable efficiency and effectiveness throughout the project that will ultimately enhance the design deliverables and help control financial considerations.

This LEAN methodology allows us to use the team's collective experience, skills and knowledge to facilitate open discussion, seek research driven opportunities, examine and test preferred solutions to create the most appropriate future state for your Beckley Veterans Nursing project.

Our team, tools and process will align with your objectives to be outlined in the early Concept and Programming meetings to confidently deliver the right outcome. Our multidisciplinary approach provides timely and accurate solutions, and mitigates risk so that the project deliverables are met with consensus and are on schedule.

Our process is supported by proven tools for data collection, interviews, and information sharing throughout design development, and operational readiness. They can be deployed in virtual environments during design to test solutions. This LEAN integrated process offers flexibility, reduces time away from the operational environment, and has proven that projects can be offered efficiently and effectively, meeting and even exceeding project goals and process aspirations.

Our integrated team will be supported by experts in operations and gerontology to facilitate the future state, Art of Possible, as we guide you in creating the future state of operations and a new home for your residents. Together we can develop a new way of delivering effective resident daily care and lifestyle, while taking into consideration

the recent and ongoing changes in the senior living environment, including COVID-19 and other future senior care risks and opportunities.

We clearly understand that the delivery process for this project is as important to you as the product and can become a new standard for work within the West Virginia long term care system. Our collective team will validate these principles at the beginning of the project process, and then use them as the guard-rails and scorecard for all future decision-making:

- Incorporate evidence-based design principles that improve resident safety and quality.
- Include staff, residents, and families in the design process to maximize opportunities to improve staff workflow and resident safety and create a resident centered homelike environment.
- Design flexibility into the building to allow for adaptation to the rapid cycle of innovation in long term care.
- Design the space to enable staff collaboration within nursing units and within the overall building.

The HCM team is committed to working with you to discover and formulate robust solutions through collaborative teaming.



RIGHT TEAM

Our high performance, integrated team comes from a vast array of backgrounds, professions and experiences across the senior living and healthcare design continuum. We strive for Value through creative fusion, continued improvement, and reduction of waste.

Our collective team's experience, knowledge, skills, abilities, and prior project involvement are highlighted in resumes and project examples within this document.

We have assembled a strong team of consultants and subject matter experts. This allows for work to happen simultaneously, while offering a deeper understanding of site, facilities, operational and resident centric service line demands and the needed requirements to deliver efficient and effective solutions that are considerate of culture, and end user defined value. We will remain sensitive to the history and the future

requirements that will need to be supported by advances in technology, and innovative opportunities, while adhering to the required accreditation and industry standards. We work collaboratively as a team, respecting experience, insight, and the value of prior lessons learned. We have in-depth insight and the means to discover and test appropriate allocation and placement of resources, augment the flows of resident life and to align spaces with key co-location of services and resources. Our research-driven, multi-disciplinary team brings best practices and innovative research to be forward thinking in seeking options and opportunities to align demands with the budget and the space available. Site and facility inquiry is led by designers, engineers, interior, landscape, and patient experience experts with decades of experience. Our team brings an insightful, thoughtful, and creative group that values an integrated approach and is stakeholder-focused on the needs of the residents, operations and the State of West Virginia.

Our care delivery, residential and operational inquiry is facilitated by a clinician and LEAN Six Sigma expert and a nationally-recognized Gerontologist. They bring lessons learned along with the tools to discover and test appropriate allocation and placement of resources, augment the flows of resident

care and align spaces with key co-location of services and resources. Our senior care strategists bring expertise in memory care, operational quality improvement, readiness, and transition planning, allowing us to be proactive and responsive to shifts in real or potential operational mandates, organization, and operational or policy change throughout the design process.

Our interior designers and planners will lead the review and analysis of your existing wayfinding, interiors, and resident experience, making recommendations to streamline and enhance the resident experiences in the replacement building. In tandem site, facility and infrastructure specialists will conduct a current state review and study to augment the team's insight and broader understanding for analysis and future state planning. We work collaboratively as a team, respecting experience, insight, and the value of prior lessons learned. We want to fully understand how you operate today, as well how the new building can create new operational efficiencies and better resident experiences to serve the residents and staff.

Our actions are always supported by measurable controls and focused on adding value to the process and project, so that collectively, we share all risks and rewards.

RIGHT PROCESS

Collaboration is the foundation of our effective practices. Our experienced LEAN experts on the team bring mentorship and LEAN training for all stakeholders new to the process.

We also believe in creating value and reducing waste. Hence our projects are founded in lean principles, which beg for integrated teams with great communication, supported by a clear goal. Therefore, we begin with a strong project charter and a robust communication plan for continuity and quality of information sharing and to mitigate risk throughout the project.

We begin with a pull planning exercise that creates established schedules, roles and responsibilities, deliverables and risk mitigation strategies. This information is compiled in the Charter which will serve as the framework for design development and construction.

This Charter is drafted and distributed and remains available for all new additions to the team. We use Design Thinking and LEAN Principles as the foundation of our Programming, Planning, and Design process to deliver effective solutions, efficiently and collaboratively. This brings up-front understanding of value to the stakeholders and serves to reduce waste. Clear goals, structured governance, and enhanced

communication, along with a defined process and proven tools that are the keys to targeted value design.

We conduct stakeholder meetings (Big Room or virtual as needed) to “empathize” or gain a greater understanding in the way West Virginia veterans homes operate and look today. We then “Go to Gemba”, where the residents live and the DHCI operations occur in real time. As an option, we can tour together virtually via pre-recorded Matterport 3D visual walk-thru of all your spaces and grounds. (see description below)

LEAN Mapping is used as “guide rails” to explore the movement of people, equipment, supplies, and communication along with key processes that govern the residents' life and the staff's work.

This coupled with mission, vision, strategic plan, best practices, accreditation, and sustainability needs are used to “define” goals and objectives for the future state. Collectively, the Integrated team can then “Ideate” or envision the Art of Possible.

We strive to create environments that attract and keep talented staff by making their daily resident care delivery easier and more personal. We consider and review staff need for tools, technology, and spaces they use to effectively do their jobs. We integrate research to allow for proven, research-driven solutions that are also informed by operational and resident flows. We know that all of this is required to create world class, award-winning environments, spaces and flows where residents are safe, secure,

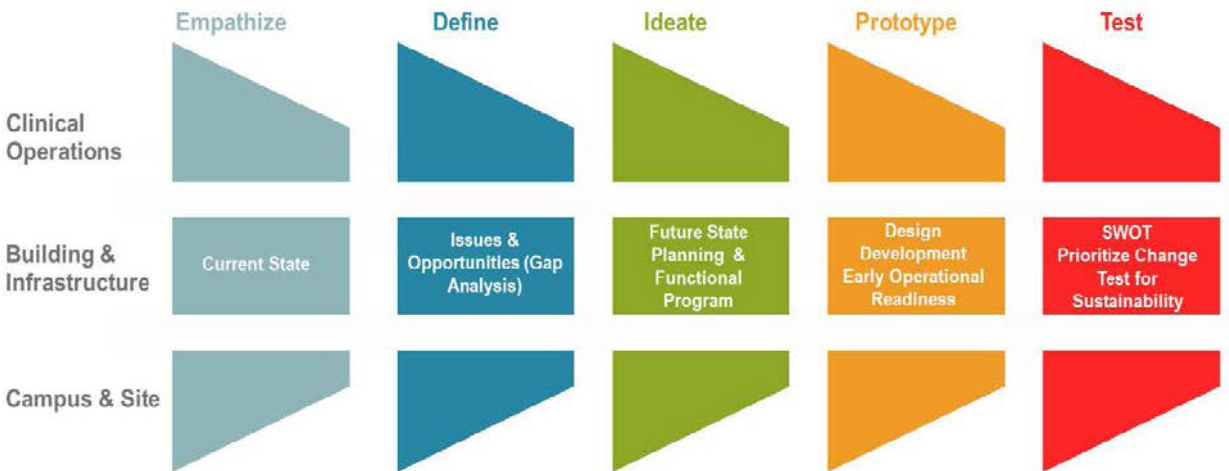
enthused and excited every day, and that their family's needs are also considered.

Together we “prototype” the future state design with online interactive or in-person gaming tools. We teach the principles of LEAN, so we treat key spaces with flows and adjacencies that are efficient, effective and a value to everyone.

Mock-ups (real, virtual reality or 3D), along with Processes are also used to identify and “test” key operational opportunities that may be impacted or that impact changes in future state planning for resources, spaces, key adjacencies, and co-locations. This global review identifies the right solutions for safe, effective and quality care, along with the potentials for enhanced operational and building sustainability. It also supports early operational readiness activities and objectives.

We are “choosing by advantage” in this iterative process as a means for collaborative, yet well-defined and consensus driven options and choices. The end goal is to offer Beckley Veterans Home the right team with the right process and proven tools and methodology for success. We are confident that all critical information, considerations, potential and real impacts are identified early, and solutions are solidified and approved throughout the project.

DESIGN THINKING



RIGHT TOOLS

Our iterative process uses tools for data and information gathering, sharing and to provide transparent communication and understanding of the project goals and status.

As discussed, our tools include a Charter that outlines the who, what, when, where and why of the project. A document that serves as a guidebook for all stakeholders that clearly outlines roles, responsibilities, schedule, deliverables, contact information and other pertinent information for efficient and effective project delivery.

We have integrated communication and shared folders for information exchange such as MS Teams®, Share-Point® and HCM-based cloud folders. We use Miro®, phones, Zoom®, MS Teams®, Apple Face Time, and other methods to conduct meetings when and if we cannot be in person. A3 documents can be also used to outline each of the teams' talks and provide transparency to the rest of the team. Work clusters can also use

a multitude of tools to deep dive into their respected tasks. This assists us in evaluating current conditions, capacity and demand of flows, services, and facilities.

Current State is analyzed for immediate and long-term opportunities and potential operational or clinical service delivery changes that may impact or be impacted by a future state change. This intense information gathering will bring immense information for analysis of opportunities, challenges, and early wins as well as validating your drivers for change. We can use live interviews and meetings, online surveys and information gathering and robust data tools for validating demand and capacity, as well as modeling solutions in real time.

Future state planning begins with collecting visioning information via tools like we use in Current State. The Visioning (ideate) Workshops, with multidisciplinary stakeholders, are held virtually or in-person to understand and validate current state, highlight key planning assumptions, and define future state demand and capacity and the guiding principles for design. We use gaming tools and interactive pieces that can be brought to you, as well.

SWOT Analysis tools identify and define prioritization, risks and opportunities. This virtual, in-person exercise further validates assumptions and allows for refinement of phasing and facility planning as different options may highlight additional considerations, challenges, opportunities, and recommendations.

We have many tools and technology that can be shared and used to complete project tasks and deliverables. All will be used as required to get the right information, timely and accurately.



Phase-by-Phase Approach

Pre-Kick Off & Kick Off Work Team Building & Information Gathering Matterport 3-D Camera Docu- mentation

Pre-Kick Off & Kick Off

This due diligence phase to begin the project allows for a deeper understanding of current state alignment with operational and nursing and memory care best practices, industry standards and regulations. This information and initial benchmarks will provide an early understanding of the potential and required degree of change, as well as highlight areas requiring further evaluation.

This will include conducting a web-based interactive survey with your chosen team members to gather qualitative data required for future-state planning.

Our initial kick-off meeting is initiated with introductions, and team building. We will

confirm Guiding Principles and define the Resident Life goals.

Followed by development of the Project Charter, that will highlight the project governance, roles and responsibilities, schedules, communication plan and risk mitigation strategies. The Charter also provides for continuity and quality of information sharing and risk mitigation throughout the project. The Charter is a living document and serves as a reference guide that outlines project scope, governance structure, stakeholder leads and committee memberships, scope tasks, deliverables, schedule, communication plans, risk mitigation strategies and continuity of operations planning for the project life cycle.

This initial kick-off includes a pull planning exercise with all key stakeholders to align all with the schedule, roles and responsibilities including deliverable dates. A robust communication plan will be developed for transparency and establishing appropriate channels and shared platforms, so that all means of communication and metrics are

understood and people are oriented to the tools and tech, as required.

Our team members have an office within proximity to the Bennington campus and all of our workshops and delivery methods can be done in person and virtually. We support big room and co-location and in-person meetings. We are open to COVID testing at the site by each of our team visiting to ensure the safety of the entire team and especially the residents.

In tandem, Matterport 3-D camera documentation of key departments or areas will be conducted, if allowed. This will allow you and our team to virtually walk through any documented department. These studies are web accessible to anyone within the DHCI team. This walk-through documentation will allow the team to understand the spaces, uses, and constraints more thoroughly.

A sample of a similar project result can be seen in the link below:

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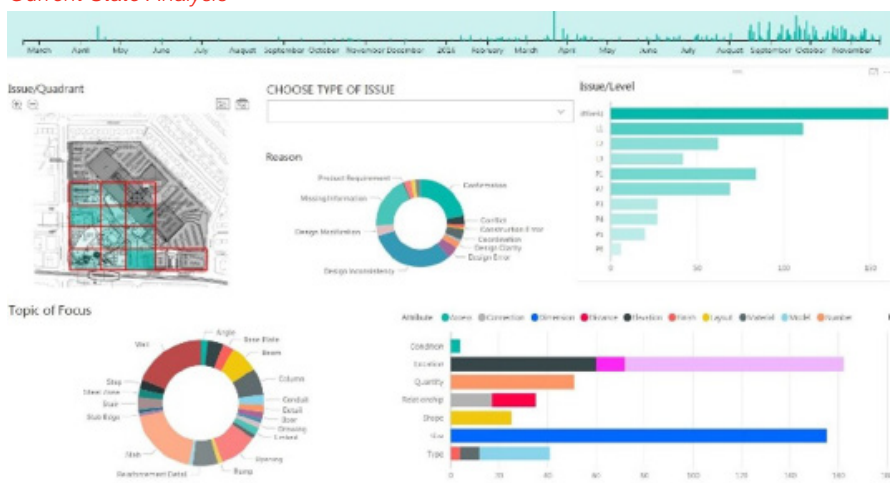


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During this phase of work, we will conduct an extensive site tour (virtually if necessary) with all our specialists and architectural team along with a review of care delivery flows. This is the LEAN principle of “going to Gemba,” or where the work happens, and it will be done in parallel with the detailed infrastructure analysis.

We will conduct a LEAN Current State workshop with the care leadership team to review the survey results and the Matterport camera work. This will allow us to understand the operational strengths and deficiencies of the existing spaces; the patient, staff, and supply flows; and identify opportunities for improvement.

Current State Analysis



We will conduct a thorough investigation of the site through drawings and on-site observation by our architecture and engineering team. Through our analysis, and a meeting with your facilities team, we will identify any potential items for correction in the existing site and verify that all services are available to meet this building's operational targets. The building systems standards and goals for this project are also documented at this time.

Define Issues & Opportunities

Specific Tasks:

- We will conduct a second meeting with key individuals to review all the findings from current state findings, noting deficiencies and opportunities from findings of the site walk-throughs.
- We will conduct an extensive field survey of site and existing building systems to identify any deficiencies that need to be corrected as part of this project. We will then request an in-person or digital review with your facilities team to identify building system standards, guidelines, and expectations for the new building.
- If desired, we will in tandem be conducting a Sustainability Visioning meeting to identify sustainability priorities and goals and identify target credits for LEED Silver or equivalent or better. In addition, we will research the zoning requirements and options for the site and make early contact with outside stakeholders as required to preempt any unforeseen issues.
- At the same time as Initial Assessment, we will start our Building and Site inventory. The current state information gathered pre-kick-off is also validated, including project goals and objectives and future state design principles. Building inventory and service line requirements are reviewed. An extensive site tour by our skilled nursing and memory care specialists and interior planners is completed along with a review of service line flows. This is the LEAN principle of “going to Gemba,” and will be done in parallel with the detailed infrastructure analysis.

Current State Matterport 3-D Documentation

team can digitally follow-up with users after the initial walk-through. By having the multidisciplinary team walk areas together, there is a more vigorous understanding of facilities, existing furniture, fixtures, equipment, and resource allocation. This assessment highlights how and to what degree buildings are currently utilized. This initial space inventory is coupled with additional information, including but not limited to a demand and capacity analysis, service line flow reviews, outcome, and key performance indicators to understand and identify operational and clinical service line successes, opportunities and potential challenges.

Specific tasks include:

- Immediately following award, we will submit a list of document requests to get us started, although we have access to current site and building drawings already.
- Initial site walks by the entire design team at the kick-off meeting (virtually or in person). Assess how the site and all buildings are currently being utilized, understand site traffic patterns, and parking.
- Extensive walk-through by our senior living, memory care, clinical and operational specialists at the same time as the field survey of existing buildings and systems.
- Walk-through and documentation of the existing wayfinding systems with recommendations for improvement
- Identify facility obsolescence.

- Conduct a digital survey with your chosen care delivery team members to gather additional information about concerns and opportunities
- Schedule a workshop for Current State has leadership present to understand the operational strengths and deficiencies of the existing nursing home and memory care environment, the residents, staff and supply flows, and identify opportunities for improvement. Depending on governance, we might plan for this as a follow up meeting without the entire stakeholder team.
- Develop a draft Building and Site Inventory report and review in person with your leadership.

Program Validation & Future State Planning

Our programming effort begins with a thorough analysis of the qualitative and quantitative data provided by analyzing the existing building and proposing a new building program for review and analysis based on best practices and budget consideration, and, considering the guiding principles and priorities we establish together in the Current State phase.

We will work with your leadership teams to understand what operational model(s) you wish to use and envision how new technologies can better support the model(s). Based upon that understanding of the resident acuity forecasts, service line demands and operational model we will develop and validate the building plan assumptions based upon detailed study of your actual projected work week / month /year and confirm it against national benchmarks.

Once the key room drivers are established and agreed upon, we will use our planning guidelines to validate nursing unit targets and will validate detailed room-by-room space programs for each unit and function using the resident requirements, key room drivers, and facility guideline requirements. We will identify key I affinities and operational best practices that will affect the development of planning options.

During this phase of work, we will work with your leadership and facilities group to analyze the assumed site opportunities and constraints, understanding how to address the site proposed. The new building should act as a new image of progress and care for Pennsylvania veterans. We will communicate with your selected leadership team and the strategic planning team to gain an understanding of the guiding principles and constraints of the project.

Specific tasks include:

- Lead a user group / leadership meeting to review operational model options and select a preferred strategy.
- Conduct a site visit or virtual site visit



to a comparable site with the user / leadership group members to evaluate features of the preferred operational model.

- Conduct one meeting to perform IT visioning with your leadership group to discuss how IT solutions can support resident care experience methods.
- Develop detailed room-by-room space programs based upon the operational model(s), key room drivers, and FGI requirements.
- Conduct in person or web-based meeting with each user group to review, refine, and finalize the room-by-room space program. Based upon our data driven analysis, we anticipate 2 Current State meetings with each user group and can edit the program live within the meeting.
- Work with your leadership group to evaluate the opportunities of the site and create design principles through a Visual Listening workshop.
- Meet with your facilities group to determine basic building engineering system requirements.
- Finalize your functional and space program, including space and operational requirements.
- Conduct an on-site meeting to review the draft program with care leadership. Bring best practices and benchmarks and LEAN introduction to the team. Summarize and translate the data and information from Objectives 1, 2 and 3.

- Using LEAN flow maps for development to conceptual plans for multiple scenarios.
- Develop criteria to evaluate potential master plan solutions.
- Assess potential capital cost required to achieve each scenario.
- Assess operational impact of each scenario including recommendations on re-purposing/demolishing certain structures, if contemplated.
- During this phase we will conduct our Visioning (ideation) Workshops with multidisciplinary stake holders. We validate current state, highlight key planning assumptions, and define future state demand and capacity. Here, we also develop criteria to evaluate the potential master plan solutions.

Future State Planning

We will develop plans and key aspects, include criteria development, information organization, det-based design and evaluation and integration.

During this phase, we will conduct our interactive Visioning (ideation) Workshops with multidisciplinary stake holders. We validate current state, highlight key planning assumptions, and define Future State operations and layout.

We introduce LEAN principles and current research findings for best practices and operational efficiencies. We use design principles, organization mission, vision and values and cultural understanding to develop

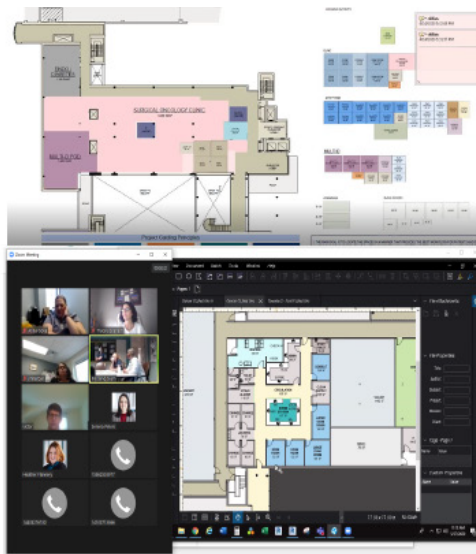
criteria to evaluate the potential design solutions.

We ideate, brainstorm and explore what is desired and what is feasible within the boundaries of the project scope and budget. Operational and service line delivery needs are used to inform space and facility need, highlight requirements for efficient and effective flow, through placement and key affinities and adjacencies. This interactive process facilitates change management and serves as an introduction to any operational transition requirements.

Solutions are modeled, analyzed, and tested live with your user groups in multi-day, multi-disciplinary charrettes to understand the impact on resident life, operations, safety, design outcomes and service models. Layouts are generated, presented, defended, refined, and ultimately evaluated by the user groups with the design team's guidance. Evaluation is done by the user groups based upon which plan layouts best meet the guiding principles, patient experience goals, and operational efficiency. We choose by advantage.

Once the user groups have a preferred plan solution, our architectural team generates the Schematic Design fit-out plans that reflect the users designs and lead one final meeting to show the staff the final floor plans for refinement and sign-off.

While the user group process is underway, we will refine the massing and exterior aesthetic of the building. As noted previously, this building should be a statement about the commitment to care for our West Virginia residents and presents an opportunity provide a new image for the Beckley Veterans Home.



Understanding material selection and envelope design early enough to validate the current cost estimate is critical. We will vet a series of options with your leadership team as early as possible to discern their comfort level around appropriate imagery. At the same time, we will develop the engineering systems, so that a final SD estimate can be provided in parallel with the sign-off process.

Specific tasks include:

- Preparing for, and conducting a LEAN Future State, on-site or virtual workshop to enable the user groups to develop a preferred SD layout within the limits of the building massing and budget. Workshops are anticipated to be:
 - 2 days (3 total Future State workshops).
 - Have 20-25 participants from a wide range of backgrounds including nurses, support staff, facilities staff, supply chain, security, administration, etc.
 - Focus on LEAN design processes.
 - Evaluate options based upon the Guiding Principles (Choose By Advantage based on pre determined criteria)
 - Workshops can be done live in person, or through digital tools

Specific Tasks:

- Pre-report web-meeting with Strategic Planners to identify any critical items from the strategic planning direction and report out early findings from our facility analysis.
- Document the preferred option for each department based upon the physical constraints of the building massing, engineering systems, and overall building program.
- Lead one meeting with each user group to review, refine, and sign-off on the final plan.
- Conduct 3 meetings with the facilities team to refine the building engineering systems.
- Conduct 2 leadership meetings to refine the exterior design concept and develop an interior design concept.
- Validate the construction cost estimate based upon the documents developed above.
- Prepare and distribute a draft final Schematic Design drawing, narrative and validated estimate.

- Conduct an owner page turn and final review of the proposed package.
- Publish the final SD package.



The Design Thinking Process was integrative, informative and despite COVID -19 we proceeded with Process Change, Schematic Design and Design Development on schedule and with all the same stakeholders. It was Brilliant....

Rhonda Wyskeil Director of Performance & Improvement & Innovation at Greater Baltimore Washington Hospital

Next steps

Scope of Work

Methodology/Approach

In our approach to the Beckley Veterans Home, our team will be focused on the project goals of both the users and Department of Veterans Assistance (DVA). It is essential that we exceed the aspirations of our clients while maintaining consistency with the State's design standards and procedures. We understand that this project will be representative of the State of West Virginia's mission for excellence in healthcare. This new community will have an impact on the public, clients and staff for generations. So, our approach and reverence for this work is with the understanding of the lasting impact it will have.

The following narrative describes our methodology and approach that we propose for the Beckley Veterans Nursing project.

Phase One:

Project Kick-Off & Pre-Design

1. Goal setting. We will ask DVA and the users to share their goals for the project. We will listen, question, and advise to develop an understanding of the project goals as clear, suitable, and attainable. At every meeting we will reconfirm these goals and ensure the on-going design continues to meet them.
2. We will carefully review any preliminary studies and cost estimates provided.
3. We will conduct field verification of existing conditions in and around the areas of work. This will include surveying services, geotechnical evaluations, and documentation of site features and topography.
4. We will analyze the site and do our due diligence to understand the impact of the improvements and the process to attain site approvals.

35% Submission, Partial Design (To be used to secure funding)

The preferred design concept will be developed, along with a basis-of-design strategy. Drawings, specifications, life-cycle cost analysis, and other required documentation will be presented at the 35% submission. Throughout all design phases we will ensure that our design conforms with the State's design guidelines relative to room sizes, materials, signage, site improvements and building systems. The Schematic Design documents will include floor plans, building sections and elevations, a site plan, and Specifications allowing for competitive bidding. Concepts for the structural systems, M/E/P systems, and construction assemblies will also be integrated into the design at this stage. Systems analyses will be performed to determine the various building systems most applicable to this project. Life Cycle Cost Analysis Documentation will determine the best options for mechanical systems, finishes, lighting systems and building envelope components.

The design will be impacted by the building's context as well, so focal points in and around the building will be considered, as well as pedestrian patterns, vehicular flow, and opportunities for connections, whether they are physical, operational, or aesthetic. This phase will provide a high-level overview of care philosophy, tangible design, and pricing to help secure the additional funding necessary to complete the Design and the project.

Phase Two:

65% Submission Design Development

After Federal funding has been secured, the design will be refined, and detailing and development of site, architectural, structural, mechanical, electrical, technology and special systems will take place. We will address all comments from the State's 35% review. Floor plans developed during the SD phase will be further refined and will serve as a basis for distribution and placement of infrastructure support systems and devices.





We will continue to develop civil, structural, MEP and other specialized systems. The Owner's security and health care systems will also be a focus for the team. In this phase we will coordinate the MEP and Owner's security and health care systems and synthesize with architectural and structural systems. Our project managers will manage the integration of the systems of each discipline into a coordinated whole.

Flow test data of the water supply will be evaluated. The fire protection system will be hydraulically calculated to verify water quantity and pressure availability. A conceptual layout of the sprinkler system will be provided. Most critically any changes for Value Engineering based on obtained funding will be incorporated.

95% Submission: Final Design Review & Permitting

All systems will be fully detailed and coordinated with other disciplines. All relevant specifications will be tailored to suit this project. Drawings and specifications signed and sealed by professional engineers registered in the State of West Virginia will be provided. The drawings will clearly express the design intent of the project and a full design package will be submitted to DVA for approval.

All previous comments will be addressed. The Drawings and specifications will be at a level that is suitable to be publicly bid, pending any final comments. We will attain Fire Marshal site and building approvals, AAB approval, and site approvals for this submission. We will complete the 100% Design Documents after permitting review and comments are incorporated.

Bidding & Negotiations Phase

The A/E team will assist in the public bid process by providing the following services:

- Issuing Bid Documents to Bidders.
- Issuing Pre-bid meeting minutes and addenda as required.
- Answering Bidder requests for information and incorporating change into addenda.
- Reviewing the bids and making a recommendation to DVA for whom to award the contract.

Contract Administration to 100% of Construction

The A/E team will assist during the construction process by providing the following services:

- The architect will assist in owner-contractor contract preparation
- The architect will issue progress meeting minutes throughout the construction process
- An on-site construction reviewer will provide site inspections throughout the construction process.
- All project submittals will be reviewed by the A/E team
- A punch-list and substantial completion certificate will be provided
- Project Closeout documentation will be reviewed and submitted for closeout and final payment to the contractor.

In summary, the HCM team will deliver a successful project development and completion for the Beckley Veterans Home experience, innovation, and our commitment to value by design.

Other Special Qualifications

LEAN METHODOLOGIES FOR AN EFFICIENT PROCESS & DESIGN

Our entire design concept is based upon the use of LEAN methodologies. We use these both to improve the effectiveness of the design around patient experience and operational efficiency, but also to improve the effectiveness of the design process. Tracey Graham, our team's Operations Improvement Strategist is both a LEAN expert and has taught LEAN Process Improvement for Healthcare at the University of Tennessee.

Key LEAN methodologies that we incorporate in our design process include:

- "Going to the Gemba": Through the Matterport camera, we will walk all the existing spaces, even when we can't be present. In the current state workshops, we will have the staff describe their workflows as they identify waste that can be corrected.
- Multi-Disciplinary Teams: By engaging the front-line staff in the creation of the design, we can ensure that we are meeting their needs and get buy-in for the solutions quicker
- 3P Future State Workshops: By rapidly and collaboratively prototyping and testing design solutions with the users, we can come to design consensus quicker than through traditional methods. These workshops use cut-out magnetic

Hord Coplan Macht has been involved in the LEAN Process in a wide variety of design projects. We understand the value that the LEAN Process brings in clarifying the operational methods to eliminate waste and improve the resident experience.

Our experience in LEAN Design has been presented at national conferences and appeared in Healthcare Design Magazine and in Healthcare Building Ideas. Key leaders on our team have been trained at the John's Hopkins Armstrong Institute for Patient Safety's LEAN Sigma courses.



TARGET VALUE DESIGN

We will work as a synergistic team to define the issues and produce thoughtful conclusions, finalizing the program and designing to those decisions, based on detailed estimates, and based on what is constructible.

We believe that we share the responsibility for detailed discovery so that we can define opportunities and challenges, establish the target value and ensure our solutions keep the Veterans at the center of the value stream. Rather than narrow choices to proceed with design, we will carry solution sets far into the design process.

Our multidisciplinary, multi focal teams will work in tandem in discovery, analysis and design development and testing. We value the opportunity for key stakeholders to engage in the design conversation and activities concurrently with those people who will procure services and execute the design.





PULL PLANNING | SCHEDULING

For more than 10 years, Hord Coplan Macht has been utilizing pull planning—a LEAN process by nature—to keep projects on schedule and all team members and stakeholders engaged.

We employ a collaborative project management process when leading the design of all our projects. Pull planning has become part of our branded approach to our projects, and has become a value-added service—whether explicitly required by the client or not. Frequent and clear communication is key to delivering a successful project. HCM works hard to build consensus among stakeholders and consultants in the early stages of every project, starting with the end goal and taking the team and working backwards through the scope and schedule to determine appropriate deadlines.

Through this process, we establish action items that need to be completed prior the milestones. The action items are defined and sequenced in such a way, so that their completion releases work for others. Hord Coplan Macht excels at facilitating this collaborative process. We lead our integral team members through this exercise to hold each other accountable for the work.

We have completed pull planning for:

- Hollidaysburg Veterans Home
- Delaware Home for the Chronically Ill Skilled Nursing
- U.S. Veterans Administration
- Brightview Innovation Center
- Brightview Alexandria
- Brightview Senior Living
- The Glen Retirement System
- Greater Baltimore Medical Center
- WellSpan Health

HCM has found this tool useful to schedule work, to find efficiencies in completing the work, and to work towards an on-time delivery of the project. Pull planning has proven to be a trusted and worthwhile process for clients.

QUALITY ASSURANCE

We believe that true quality control is the achievement of the client's and the design team's vision for the project and is not simply periodic coordination review procedures. The client and design team's vision and design strategies must be embodied in the project's documents. Further, quality control is the result of a combination of clearly articulated design goals, a series of periodic reviews to confirm those goals are being met and excellent interdisciplinary coordination.

Hord Coplan Macht employs a fully integrated quality management program that provides ongoing assessment of project progress, budget management, and document control. Throughout the design process, HCM reviews the following: overall progress; integration of identified project goals and vision; assessment of the anticipated cost vs. budget; coordination of the different consultant disciplines; and overall constructibility. During the construction documents phase, the frequency of technical reviews are increased to maintain a professional standard of care in the completion of the drawings and specifications. This process, in conjunction with the use of BIM software, ultimately leads to less conflict in the field and minimal change orders. Our projects are regularly completed with minimal change orders.

Hord Coplan Macht is proud of our reputation for producing quality documents and for managing the overall process to bring the greatest value to the completed work.

We conduct four types of quality reviews for each project throughout each phase of design to ensure that our design translates directly to what is constructed:

- Design Quality Reviews are held at SD & DD phases to verify that the design goals set by our clients and the design team are being fulfilled. In a collaborative "pin-up" setting, the studio's director of design and the project team discuss aesthetics, material options, community design constraints and client goals.
- Technical Quality Reviews occur with a team of senior architects to review the technical aspects of the building. They are scheduled at DD & 50% CD phases to refine the technical aspects of the drawings and provide experienced input regarding construction details and building systems.
- Quality Control Reviews of the entire drawing set and specifications are performed by a senior-level colleague who is outside the project team. This "fresh set of eyes" is used prior to the major project submission milestones and includes review of our consultants' drawings, for complete interdisciplinary integration of the documents.
- On-site Quality Reviews are conducted during the Construction Administration phase to ensure that what we designed is being executed in the field. As such, frequent site visits and field reports are a crucial part of this quality control process.

CONSTRUCTION ADMINISTRATION

Some might believe that once the design and drawing is completed, the architect's role takes a back seat to that of the Contractor. On the contrary, at HCM, we take our job very seriously during the Construction Administration phase. We know that the stakes are at their highest during this time, with the money our clients spend each month during the construction phase easily exceeding the design phase by a factor of ten. With this comes a corresponding increase in diligence, thoroughness and professionalism from HCM.

At HCM, we see our role during the Construction Administration phase as your eyes, ears and advocate, helping protect your interests, to be sure that the building that is built is not only the same as the one we designed, but more importantly, is the one you asked for.

During Construction Administration, the qualified and experienced HCM team will provide the following services:

- Attending regular construction progress meetings.
- Observing construction at correct intervals for conformance to drawings and specifications.
- Processing contractor's shop drawings and submittals,
- Reviewing RFI's and other questions.
- Documenting job progress and milestones by means of field reports.
- Evaluating claims and change orders.

- Reviewing the results of construction tests and inspections for compliance with the documents.
- Evaluating and processing contractor requests for payment.
- Administering substantial and final completion, including reviewing and walking the Contractor's punchlist.
- Administering the closeout process including review and transmittal of the warranties and manuals and preparation of Record Documents if directed at the outset of the project.

As a firm-wide standard, HCM uses Newforma for record keeping and documentation during the Construction Administration phase and for distributing deliverables and maintaining correspondence records during the Design phases of the project. Our work product (whether it be responses to RFIs or Field Reports) is required to reside on our servers due to the Statute of Limitations mandated by the state the project is located in. We recognize that both Hines and the General Contractor will likely use Procore. To eliminate double data entry for architects and contractors, we suggest the use of Revit's Newforma Contract Management (NCM) Connector with ProCore to make it easier to review and transfer submittals and RFI's.

Hord Coplan Macht is currently delivering senior living projects in Massachusetts, Pennsylvania, Delaware, Maryland, Virginia, Louisiana, Alabama, Tennessee, Michigan, Colorado, and Arizona.

