



BEACON STRATEGIES

Response to *RFQ198 - Aged Care Services Review* for Shire of Donnybrook Balingup

Proposal

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Prepared for Shire of Donnybrook Balingup

September 2018

Version 1.0

www.beaconstrategies.net

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1. ABOUT OUR PROPOSAL

OVERVIEW

We believe that our proposal to deliver the Shire of Donnybrook Balingup's Aged Care Services Review represents value for money and a genuine opportunity to plan for services that empower older people to live well, be healthy, be socially connected and live independently within the community.

DEMONSTRATED CAPABILITY IN STRATEGIC PLANNING IN THE AGED CARE SECTOR

Our organisation is currently supporting a number of our clients to better understand the aged care sector, ongoing sector reform and identify strategic opportunities to purchase or deliver aged care services to meet the needs of their community.

SIGNIFICANT LOCAL GOVERNMENT EXPERIENCE ACROSS THE PROJECT TEAM

Every member of the Beacon Strategies project team has experience within the local government operating environment. Spanning aged care, disabilities, community development, health and wellbeing and communications to name a few, our project team will deliver project materials in line with the remit of the Shire of Donnybrook Balingup.

DEEPLY ENGAGED AND PARTNERED APPROACH TO WORKING WITH THE SHIRE OF DONNYBROOK BALINGUP.

We are committed to a genuine partnership arrangement with the Shire of Donnybrook Balingup ensuring that we deliver targeted advice, recommendations and implementation guidance to genuinely achieve the objectives of the project. Through a strong partnership, we will overcome the barrier of distance through commitment to site visits and utilisation of technology to enhance communication.

2. ABOUT BEACON STRATEGIES

2.1 Organisational capability

Beacon Strategies is a mission-based health and social services consultancy. Established in 2015 and based in Queensland, we are committed to partnering with like-minded organisations to plan, design, implement and evaluate social change.

Beacon Strategies is experienced in end-to-end involvement in projects for both planning and commissioning agencies and service providers with core areas of expertise being:

- **service design**—to help organisations develop models of change that are evidence-based, responsive to local need and informed by industry-leading knowledge and techniques
- **project management**—supporting organisations to apply a systematic implementation approach to maintain fidelity with an evidence-based model and to ensure contractual obligations and milestones are met or exceeded.
- **evaluation and reporting**—establishing data collection systems, undertaking qualitative and quantitative evaluation, conducting program reviews, and developing impactful reporting to funders and other stakeholders. .

Our consultancy approach applies several key components to ensure our work is evidence-informed and responsive to the needs of the community, including:

- **Community conversations:** We engage with the community through focus groups, conversations and surveys to ensure that the voice of the community is built into a program, service or commissioning process.
- **Evidence review:** We seek and understand research literature underpinning a social issue then prepare evidence reviews that articulate the implications for a client organisation.
- **Population level data analysis:** We provide an expert level of data analysis to determine the overall need for programs, inform targeting of future activities and visualise geographical needs.
- **Stakeholder engagement:** We engage with expert stakeholders to unlock years of experience and insight, understand the local context and establish partnerships and collaborative arrangements.

- Service mapping: We help organisations understand the local service market through service mapping and market analysis to identify service gaps and avoid duplication.

Beacon Strategies has a significant amount of experience working across the aged care sector with a number of diverse clients, including significant engagement by Primary Health Networks (PHNs) throughout Queensland.

2.2 Past experience and performance

Beacon Strategies has undertaken a number of comparable projects, ensuring recent experience working in the aged care sector in a strategic capacity. Although from the context of primary health care, the work examples below held specific focus on the role of the aged care sector, community care sector, local government and NGOs to deliver coordinated and integrated services based on extensive data analysis and research.

2.2.1 Gold Coast PHN Aged Care and Palliative Care Commissioning Project (*Project value: \$200,000*)

Beacon Strategies are currently delivering the Palliative Care and Residential Aged Care Facility Commissioning Project under contract by the Gold Coast Primary Health Network. The project commenced in June 2018 and is due to conclude on October 2018.

As identified by the Gold Coast Primary Health Network (GCPHN), the purpose of delivering the Palliative Care and Older People (with a focus on residential aged care facilities and after hours) Commissioning Project (The Project) is to:

“... provide evidence-based information and undertake stakeholder engagement to inform the design and delivery of an agreed regionalised approach to GCPHN investment in palliative care and an after-hours response in relation to aged care...”

Beacon Strategies were contracted to deliver the following objectives as a result of the project:

- Understand the respective palliative care and aged care patient journeys in respect to health and non-health related inhibitors, enablers and supports across a diversity of perspectives and life stages.
- Understand and articulate population needs across the GCPHN region, paying particular focus to the significant body of existing data analysis and stakeholder consultation already conducted and analysing newly identified qualitative and quantitative data to fill gaps in knowledge.
- Identify and improve organisational and sector knowledge relating to evidence-based models of care relating to both palliative care and aged care.
- Identify points of leverage in the policy environment at a national, state and regional level to maximise the impact of future palliative care and aged care investments.
- Identify points of leverage from relevant models of care identified by the Integrated Care Alliance Palliative Care Group.
- Understand and synthesise expert opinion relating to the overall need for palliative care and aged care services (where to target services), in addition to gaining sector agreement on the best path forward for investment across each sector.
- Summarise and articulate the findings so they are of maximum utility for GCPHN and the broader palliative care and aged care sectors.
- Outline relevant KPIs and program outcome measures to assist GCPHN to monitor the effectiveness of future commissioned services.

Referee

Kellie Trigger, Planning and Stakeholder Engagement
Program Manager, Gold Coast PHN.

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2.2.2 Service Mapping For Brisbane South Older People and Palliative Care Services

Beacon Strategies are currently finalising the Service Mapping For Brisbane South Older People and Palliative Care Services Project, under contract by Brisbane South PHN. The project commenced in July 2018 and is scheduled to be completed prior to the end of September, 2018.

The purpose of the project is to undertake a comprehensive service mapping process to inform Brisbane South PHN's development of a joint Older People's Health and Wellness Strategy.

The project aims to achieve the following objectives:

- Establish a current view of all older people and palliative care health services delivered in the Brisbane South PHN region by type and geographic distribution
- Identify gaps in delivery and reduce potential duplication of services
- Compare identified health need within the region and projected demand
- Provide an analysis of key considerations for the region's future planning with a particular focus on Culturally and Linguistically Diverse (CALD) consumers and potential health navigation models of care.

Beacon Strategies will deliver a comprehensive regional service profile outlining the current capacity and projected demand for services within the Brisbane South region, along with a strategic lens document outlining key considerations for future planning within the region, with a particular focus on vulnerable consumers such as Aboriginal and Torres Strait Islander and CALD populations.

The findings and outcomes of the project will be considered as part of the strategic planning and prioritisation process to be undertaken by Brisbane South PHN in consultation with the Older People's Governance Group and Older People Health and Wellness Strategy Steering Committee, along with existing BSPHN Clinical and Community Advisory Councils.

Referee

Nicole Potts, Program Manager – Older People Brisbane South PHN. **M:** 0408 709 886 **E:** npotts@bsphn.org.au

2.2.3 Other experience

The projects listed below demonstrate Beacon Strategies broad capability in delivering projects across a range of health and social service areas. Key project components include service mapping, quantitative data analysis (need and service utilisation), stakeholder and consumer consultation, literature reviews and research and horizon scanning. As an

organisation, these key elements are core to all of our projects as demonstrated in the following examples:

- Developed and implemented a suite of training packages for Ipswich City Council. The delivery of a training package for Ipswich City Council Community Development staff was geared toward improving the departmental approach to identifying and articulating community need across a range of issues, designing and documenting effective approaches to meet identified needs and establishing and implementing evaluation frameworks to gauge the effectiveness of a range of initiatives over time. This project has further developed our capability to implementing organisational development activities.
- Currently working collaboratively with Brisbane North PHN to conduct a high-level program review of their Brisbane MIND and Brisbane MIND Suicide Prevention programs. The purpose of the review is to begin to better understand the current state and potential future state of Brisbane North PHN funded psychological therapy services. The review will inform the subsequent review phases and is the first step in the reform of Brisbane North PHN funded psychological therapy services. The review comprises a number of key elements including data analysis, a scan of alternate models and stakeholder and consumer consultation. Consumer consultation will be designed to ensure that future psychological therapy services will be commissioned to achieve better outcomes for clients.
- Currently working with Brisbane North PHN to develop a number of suicide prevention care pathways to support people in the Brisbane North PHN region to get the right care in the right place at the right time when they are at risk of suicide. Progress toward the overall goal was achieved through development of a clear, organised and connected suicide prevention clinical care pathway across and within the Brisbane North PHN region, which has high utility across sectors and enhances the care and support for people at risk of suicide and for people who require aftercare/follow-up after a suicide attempt, or who are bereaved.

- Supported a market-led needs assessment and service design activity between three prominent community-based NGOs to deliver an intensive early years program aimed at reducing the number of children interacting with the child safety system.
- Developed a high-level roadmap to achieve co-commissioning of MHAOD service in the PHN environment over a five-year planning horizon. The project was commissioned by Central Queensland, Wide Bay and Sunshine Coast PHN with the key audience being members of the Queensland PHN CEO working group
- Authored the Central Queensland, Wide Bay and Sunshine Coast PHN Stepped Primary Mental Health Care tender documentation.
- Authored 'The Future of Mental Health in Brisbane South: the roadmap to mental health reform' (Brisbane South PHN): At the commencement of the mental health reform process in early 2016, we were engaged to develop a vision and road map to guide the local implementation of the mental health reform in Brisbane South. Components of this project included: consultation with the community and stakeholders, development of a high-level model, articulation of the guiding principles of commissioning, consideration of the patient journey, required governance and a public consultation process.
- Managed an alcohol and drug sector engagement process resulting in the commissioning of service providers to deliver alcohol and other drug treatment services in addition to commencing a regional alcohol and other drug treatment services sector collaborative tasked with tackling system change in the Brisbane South PHN region
- Provided population health planning services to the Gold Coast PHN relating to their community needs assessment, to assist the organisation focussing strategically on genuine issues for their community.
- Managed an Aboriginal and Torres Strait Islander sector engagement process, resulting in funding local Aboriginal and Torres Strait Islander service providers to deliver targeted social and emotional wellbeing services to the Brisbane South PHN population

- Conducted a high-level program evaluation (including data analysis and service review) and recommendations relating to Brisbane South PHN's Access to Allied Psychological Services (ATAPS) program. This resulted in recommissioning the program of work to better meet the needs of the Brisbane South PHN region.
- Developed a high-level commissioning approach for chronic disease management in collaboration with Central Queensland, Wide Bay and Sunshine Coast PHN resulting in a targeted and strategic approach to chronic disease related activity in Central Queensland.
- Supported Central Queensland, Wide Bay and Sunshine Coast PHN in their market approach for commissioning alcohol and other drug treatment services and Aboriginal and Torres Strait Islander mental health services resulting in the procurement of locally based services for the community
- Partnered with both Northern Rivers Community Gateway (Lismore, NSW) and Acacia Ridge Community Support Inc. (QLD) to develop an in-depth prenatal care coordination and support service unique to each community. The model was inclusive of community consultation, stakeholder consultation, evidence review, population health data analysis and service mapping.

3. OUR APPROACH

3.1 Project Management

Beacon Strategies will deliver the project in line with the milestones and deliverables outlined by the Shire of Donnybrook Balingup. A dedicated focus to project management will ensure that the Shire of Donnybrook Balingup will have adequate opportunity to feed into the project and have oversight and control over the acceptance of deliverables. This will ensure that the project material being generated is of high quality and optimum utility to the funder.

Throughout the duration of the project, Beacon Strategies will maintain a focus on ongoing project coordination and administrative tasks associated with delivering the project. Regular project steering meetings are also factored in to the overall price structure to ensure that collaboration with the Shire of Donnybrook Balingup is adequately resourced.

Our aim is to ensure the Shire of Donnybrook Balingup have every opportunity to shape the development of the project approach from the earliest stage possible. Beacon Strategies will remain flexible throughout the duration of the contract with co-design and approval points built in to each project phase. Beacon Strategies is committed to working in partnership with the Shire of Donnybrook Balingup throughout the life of the proposed project. To achieve this, we will engage closely with key staff nominated by the Shire of Donnybrook Balingup.

Beacon Strategies have developed an industry specific project management tool providing our clients with full transparency of project progress in real time. We use our project management tool to guide conversations regarding project timelines, build trust with our clients and ensure that everyone in the project team is accountable for delivery of work items that are on time.

Our approach to project management encompasses a dedicated project manager, ensuring a singular point of contact between the project team, funder and other project governance mechanisms. By using a project manager approach we are able to inject diverse skills into the project team when required, such as specialist research and data analysis expertise and specialist communications and engagement expertise to develop and implement specific project components.

Beacon Strategies are committed to completing the project within the timeframe allocated by the Shire of Donnybrook Balingup's objective.



3.2 Milestone 1: Project Charter and Project Schedule

Beacon Strategies will collaboratively work with the Shire of Donnybrook Balingup to gain agreement on the project scope, scale, timelines and high level methods used for both quantitative and qualitative data collection.

Beacon Strategies are accustomed to developing key project documentation (e.g. project charter and project plan) and envisage that the first stage of the project will be used to collaboratively develop the overall project approach with the Shire of Donnybrook Balingup. After co-designing and finalising the project charter and plan, we will make the necessary alterations and resubmit to the Shire of Donnybrook Balingup for approval. This deliverable will also outline our approach to engagement with existing Shire of Donnybrook Balingup consultation mechanisms as well as executives and political representatives.

3.3 Milestone 2: Information Gathering

In addition to the project charter, Beacon Strategies will prepare a high level approach for each of the project's key activities. Beacon Strategies envisage that a set of key activities will be required to achieve the Shire of Donnybrook Balingup's objective.

3.3.1 Detailed services map

Beacon Strategies will build upon the existing knowledge base that the Shire of Donnybrook Balingup has collected relating to aged care service mapping. Beacon Strategies will aim to improve the sophistication of the service information available to the Shire of Donnybrook Balingup through utilising a multi-methods approach, consisting of desktop research, telephone interviews and web-based survey instruments. Commentary will be provided regarding the strengths, weakness, opportunities and threats apparent within current service infrastructure.

The final service mapping approach will be co-designed with the Shire of Donnybrook Balingup and agreed upon prior to commencement.

3.3.2 Horizon Scanning

A scan of the current Local Government Environment will be undertaken to gain a rounded view on the cost-benefit implications of outsourcing aged care services to external providers

in addition to exploring the risks and opportunities with doing so. Dedicated focus will be applied to understanding potential long-term benefits to the community (economic, social, environmental and governance).

An understanding of individual providers' business and operational models will be gained with a view to identifying and creating gains in service and business efficiency. Beacon Strategies will explore collaborative service sharing models (e.g. gaining backroom efficiencies) and provide a detailed cost-benefit analysis for consideration of Council.

An in-depth policy scan of the My Aged Care and federal funding environment will also be utilised to ensure that recommendations delivered under the project will be within the relevant policy context and cognisant of significant reform activity occurring nationally in parallel. Beacon Strategies will review and analyse a number of key documents supplied by the Shire of Donnybrook Balingup relating to current strategic direction. Beacon Strategies will also review best practice models from other Local Government Areas to ensure The Shire of Donnybrook Balingup and its community receive contemporary and best value aged care services.

Prior to commencement of this project activity, Beacon Strategies will gain agreement on approach with the Shire of Donnybrook Balingup.

3.3.3 Population level data analysis

Beacon Strategies will provide a detailed analyses of existing service demand and population need data to strategically guide recommendations regarding to aged care services in the Shire of Donnybrook Balingup. Initially, data sourced from Public Health Information Development Unit (PHIDU) will be used to examine service demand indicators at a subregional level. Data indicators may include:

- Male/female/total usual resident population by 5 year age groups
- Index of Relative Socio-economic Disadvantage (IRSD), 2011
- Median age at death of persons, 2010 to 2014.
- Premature mortality by selected cause, 2010 to 2014
- Admissions by hospital type and sex, principal diagnosis and sex 2014/15
- Potentially preventable hospitalisations – Chronic conditions, 2014/15
- Age pension recipients, June 2016
- Seniors Health Card holders, June 2016

- Estimated resident population identifying as Aboriginal and Torres Strait Islander, or culturally and linguistically diverse (CALD)
- Older adults with a profound or severe disability, total and living in the community
- Care need ratings of people in aged care services

Other sources of service utilisation data will also be explored to ensure that a rounded and holistic view of subregional quantitative data will be included in the needs assessment component of the project. Other data sources will include:

- AIHW Gen Aged Care Data portal, including:
 - Aged care services and places, including home support, home care, residential care and other service types
 - Admissions, people using, exits and pathways to aged care services
- AIHW My Healthy Communities data portal
- Medicare Item Reports for relevant MBS and PBS items

Prior to commencement of this project activity, Beacon Strategies will present a list of available data indicators (supply of services and demand for services) and a plan for analysis of the data for approval by the Shire of Donnybrook Balingup.

3.3.4 Literature review and research

Where possible, a review of contemporary literature (grey and academic) will be undertaken to better understand the current quality of services in the Shire of Donnybrook Balingup but also compare them to alternate service delivery models implemented in other local government areas in Australia. The literature review activity will also extend to comprehending and articulating the best practice approaches to improving social inclusion, social and civic participation, built environment, transport, housing, community support and age appropriate services.

Prior to commencement of this project activity, Beacon Strategies will gain agreement on approach with the Shire of Donnybrook Balingup.

3.3.5 Issues identification consultation

Beacon Strategies will engage directly with relevant stakeholders identified by the Shire of Donnybrook Balingup. Beacon Strategies will be flexible in our approach and allow multiple

opportunities for key sector stakeholders and community members to engage in the process. A mixed methods approach will be used and may comprise phone interviews and surveys in addition to focus groups and workshops. Beacon Strategies are committed to traveling to the Shire of Donnybrook Balingup to deliver community based workshops. 3 site visits have been factored in the overall pricing of our offer.

Beacon Strategies will engage with local communities via a mix of workshops and interviews to detail the client journey for aged care across the Shire of Donnybrook Balingup footprint. Beacon Strategies will engage with key priority groups and generate sample case studies detailing the local community experience. The final client journey mapping approach will be co-designed with the Shire of Donnybrook Balingup.

3.3.6 Draft report

The findings captured in the initial 'information gathering phase' will be documented and presented in a draft report, for consideration and comment by the Shire of Donnybrook Balingup. As with all of our key project deliverables, the Shire of Donnybrook Balingup will be given ample opportunity to provide feedback and advice on the development of the draft report.

3.4 Milestone 3: Final Report

3.4.1 Co-design workshops

Beacon Strategies will lead the workshop planning process, with support from the Shire of Donnybrook Balingup to ensure alignment with broader project objectives. The co-design workshops will be designed in a way that fosters optimum engagement with key aged care stakeholders. As the project manager, Beacon Strategies remain open and flexible to the design of the workshop phase, leaving open the potential to conduct the workshops in a multitude of ways including small groups, large groups or one-on-one interviews.

Pre-workshop consultation e.g. telephone interviews, face-to-face interviews and surveys is also factored in to the overall project budget to ensure that the workshops are designed with the feedback of key stakeholders.

3.4.2 Final document

The final report will be inclusive of content derived from the initial 'information gathering phase' positioned alongside a suite of recommendations and an implementation road map to guide future activity for the Shire. The final report will be submitted for comment and approval by the Shire of Donnybrook Balingup. As per Request for Quotation, Beacon Strategies are committed to presenting the findings back to the Shire of Donnybrook Balingup in person.

4. CURRENT CAPABILITY

4.1 The Beacon Strategies project team

4.1.1 Mitchell Stalker (Director, Beacon Strategies)

Mitchell will be the project lead and provide oversight and ultimate accountability for all project activities, milestones and materials. Mitchell holds a Master of Public Health and Bachelor of Health Sciences (Population Health and Health Promotion). Professionally, Mitchell has held positions across multiple sectors and has spent time in both local and state government, state peak bodies, regional primary health care commissioning bodies, international humanitarian work and independent consultancy prior to co-founding Beacon Strategies. Mitchell is well accustomed to the Local Government environment having spent a number of years working on a number of health, social inclusion and community development projects for the Ipswich City Council.

Additionally, Mitchell brings demonstrable experience in the palliative care and aged care sectors having sole authored a regional palliative care strategy and have overseen the development on an aged care strategy, further detailed below:

- Greater Metro South Brisbane Medicare Local's Palliative Care and End of Life Planning Strategy: 2014–2017: Mitchell Stalker led development of this strategy resulting in several key activities being recommended for regional investment. Mitchell coordinated the stakeholder consultation, data analysis (population health and service utilisation), and triangulation of priorities to deliver evidence-based recommendations.
- Greater Metro South Brisbane Medicare Local Older Adults (65+) Health and Service Plan. Mitchell managed an external consultant to complete this key piece of work, focusing on residential aged care facilities and primary and secondary care integration. Mitchell was responsible for oversight and accountability of the entire project, which led to key initiatives being identified for investment.

4.1.2 Rebecca Patterson (Senior Consultant)

Rebecca will be the key project resource and manage the day-to-day operations of the project. Rebecca is an experienced community specialist with 12+ years experience in working in the local government environment. Rebecca has spent significant time working across community development, safety, seniors and ageing and disabilities within Brisbane City Council, Redland City Council and City of Gold Coast.

Rebecca has overseen a number of aged care related projects including the successful transition of Redland City Councils' Day Respite Service and Home Assist Secure Programs to community providers as well as the redevelopment of the Donald Simpson Centre to deliver a suite of service responses for older adults, scoping an Age-Friendly Redlands Concept and Project Plan, researching best practice programs and projects for older adults, facilitating and managing the Redland Senior Network (including development of the Redland Senior Network Action Plan), implementing Redland Aged Care Providers Emergency Management Arrangements and being the Business Continuity Planning Resource for Aged Care Facilities in Queensland produced in partnership with Redland City Council and Emergency Management Queensland (now Queensland Fire and Emergency Services).

4.1.3 Beth Burgess (Communications, Engagement and Change Specialist)

Beth will apply her advanced skills in communications and engagement to the design and implementation on all related consultation components of the project. Beth holds qualifications in the form of a Bachelor of Business Communications and is a certified IAP2 Practitioner. Beth is a leader within the communication and stakeholder engagement field having spent almost 20 years facilitating, guiding and implementing communication and engagement outcomes on a range of projects for local, state and federal governments, for corporates and charities.

4.1.4 Project support

In addition to the core project team, Beacon Strategies have a number of skilled team members to draw on to ensure we have capacity to manage peak times of demand and

ensure that all project materials are delivered on time and of high quality. The team members listed below may support elements of the project.

Team member	Position	Qualifications / experience	Role
Elliot Parkinson	Director, Beacon Strategies.	<ul style="list-style-type: none"> • Master of Public Health • Bachelor of Science • Extensive experience in local government from a planning and evaluation perspective 	<ul style="list-style-type: none"> • Quantitative data analysis
Aurore Pascaud	Associate consultant, Beacon Strategies	<ul style="list-style-type: none"> • Master of Public Health • Bachelor of Arts 	<ul style="list-style-type: none"> • Service mapping resource • Evidence review resource
Lilian Tamas	Associate consultant, Beacon Strategies	<ul style="list-style-type: none"> • Completing Master of Public Health • Bachelor of Health Science 	<ul style="list-style-type: none"> • Service mapping resource • Evidence review resource

5. RESOURCING

Beacon Strategies charge a flat day rate of \$1,000 (excluding GST) for local government clients. Beacon Strategies welcomes further negotiation with the Shire of Donnybrook Balingup to refine the scope of work to meet any budget constraints. Beacon Strategies have accounted for 135 consulting days, travel and accommodation for three scheduled site visits, and relevant project materials.

No.	Expected Output	Cost
1	Project management, oversight and administration. <ul style="list-style-type: none"> 5 days @ \$1,000 per day 	\$5,000
2	Milestone 1: Project charter and project schedule <ul style="list-style-type: none"> 5 days @ \$1,000 per day 	\$5,000
3	Milestone 2: Information gathering and research phase <ul style="list-style-type: none"> 35 days @ \$1,000 per day 	\$35,000
4	Milestone 3: Final report <ul style="list-style-type: none"> 10 days @ \$1,000 	\$10,000
5	Labour for site trips <ul style="list-style-type: none"> 5 days x 2 people = 10 days 3 days x 2 people = 6 days 2 days x 2 people = 2 days Total = 18 days @ \$1,000 per day 	\$18,000
6	Travel expenses (based on two Beacon Strategies staff members): <ul style="list-style-type: none"> Site trip 1: information gathering (5 days)* Site trip 2: solution development (3 days)* Site trip 3: presentation of findings (2 days)* 	\$13,000
7	Printing and stationary	\$2,000
	Total cost (GST exclusive)	\$88,000

**Price all inclusive of transfers, flights, hire car, accommodation and meals*

5.1 Value for money

Beacon Strategies delivers genuine value for money across all of our projects. In relation to the Aged Care Services Review, we demonstrate our value for money in a number of ways, including:

- Competitive rates (\$1,000 per day, GST exclusive); our rates are below market average yet we offer a highly experienced and cross dimensional team with various skillsets and experience.
- Offering ongoing strategic advice throughout the project. If you need to pick up the phone to discuss any elements of the project this is all part of the offer.
- The diversity of skills in our team is immense including public health, service planning, research and evaluation, communications and change management

5.2 Proposed payment schedule

Payment triggers	Estimated date	Amount (exclusive of GST)
Commencement – 50% <i>Acceptance of project charter/agreement</i>	October 2018	\$44,000
Mid point – 25% <i>Acceptance of draft report</i>	31 December 2018	\$22,000
Successful completion – 25% <i>Acceptance of final report</i>	28 February 2019	\$22,000
Total (exclusive of GST)		\$88,000

6. AUTHORISATION AND CONTACT DETAILS

6.1 Authorisation

Signatory name	Role	Signature	Date
Elliot Parkinson	Director, Beacon Strategies		23/09/18

6.2 Contact details

For all enquiries relating to our tender submission, please contact Elliot Parkinson, Director of Beacon Strategies on 0413 191 547 or via email elliott@beaconstrategies.net.

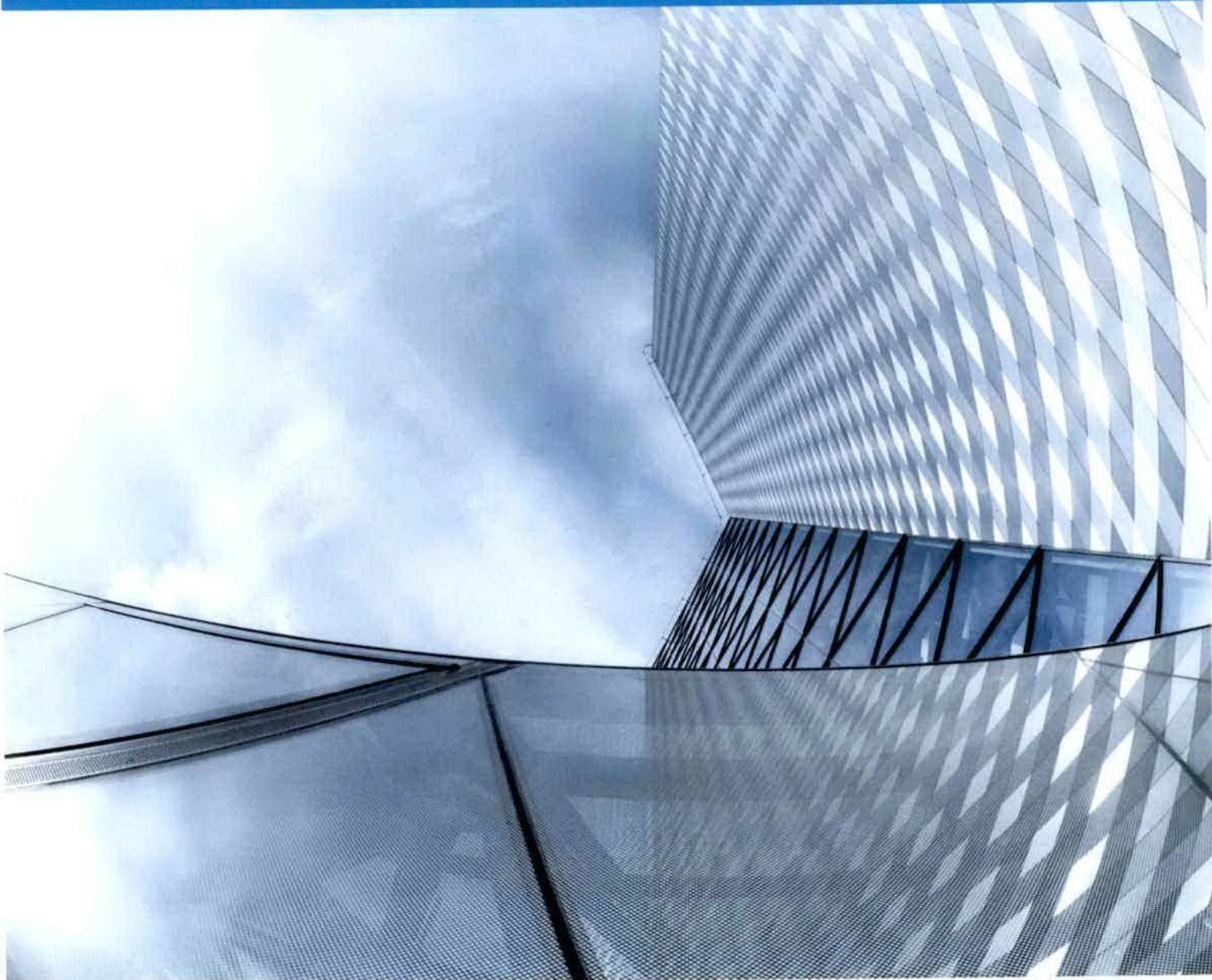
23 Sept 2018



Proposal

Shire of Donnybrook Balingup

RFQ 198 - Aged Care Services Review



Rev	Originator	Approved	Date
01	Jeremy Burtenshaw	Martin Pugh	13 Sept 2018
02 FINAL	Jeremy Burtenshaw	Martin Pugh	23 Sept 2018

Contact

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Executive summary

Shire of Donnybrook Balingup RFQ 198 - Aged Care Services Review

We are pleased to submit our proposal for the Aged Care Services Review in the Shire of Donnybrook Balingup.

We commend the Shire of Donnybrook Balingup for taking real steps forward to secure the best outcomes for your constituents. Your commitment to the community is evident and your commitment to holistic aged care is exemplary. Your vision, mission and values will be reflected in the course of our work.

For this review Turner & Townsend have assembled a consortium with Paxon Group to bring you the best possible combination of aged care service advisory and financial analysis.

Turner and Townsend is an international provider of advisory, project management, cost management and contract services in the real estate, natural resources and infrastructure sectors. With a long history of working with Government, and health in particular, Turner & Townsend understand the importance of identifying the best value for money solution that meets the changing needs of the Shire of Donnybrook Balingup. We are experts in the application of business case frameworks both in WA and nationally.

Paxon is a leading expert in health, aged care and disability projects, advising on over \$6 billion worth of health and aged care transactions in the last five years. Paxon's experience in health, aged care and disability services is extensive, covering public, not-for-profit and privately-owned facilities in virtually every State and Territory in Australia. Paxon provides advice to private operators, State and Commonwealth Governments, Local Districts and Health Services.

The benefits of engaging Turner & Townsend and Paxon are extensive. In brief:

- We understand the importance of financial sustainability, and know how to secure it
- The review will be steeped in years of experience in the delivery of major advisory commissions and projects
- We have allocated senior personnel to the team who bring a wealth of experience; as former clinicians they understand what good aged care is
- We know the market; we know who is out there, and what their services should cost you
- Our team is based in Perth, so we are within easy reach of Donnybrook and Balingup
- Our team will stay around; excepting extraordinary circumstances you can expect the resources we include in this bid to be with you until the end
- We are experts in value/benefit identification and management which is critical to development of a robust review
- We have in house cost management services who will provide the asset condition report
- We are accredited to ISO9001 (Quality), ISO14001 (Environment) and AS/NZS 4801 (Occupational Health and Safety) (see Appendix 8)

Executive summary

Shire of Donnybrook Balingup
RFQ 198 - Aged Care Services Review

Our methods are best in class, our project team is highly experienced and our fee represents exceptional value for money. The Shire of Donnybrook Balingup can be assured that, by appointing Turner & Townsend and Paxon, you are engaging a high performing partner that can be trusted with this important review.

Please do not hesitate to contact us if any additional information is required.

Sincerely,



Jeremy Burtenshaw

Associate Director, Regional Health and Aged Care Sector Lead

Our understanding of your requirements

Shire of Donnybrook Balingup RFQ 198 - Aged Care Services Review

In this section we set out our understanding of (1) the background of the review, (2) the path taken to authorise the review and (3) what you require from the review to enable the Shire to select the optimal future path for the Shire and its constituents.

You are a Shire that is committed to being age-friendly – a Shire that values, supports and empowers older people so they can live well, be healthy, be socially connected and live independently within the community. You are also a Shire that recognises the need to provide services and facilities to those who (through economic, health or ageing issues) cannot live independently within the community in a model/manner that is sustainable to the rate payers.

We note that you have adopted a 10 year Strategic Community Plan; in it you identify that (1) medical, health and aged care services are considered essential to the district and (2) residents have expressed a desire for these to be further developed.

We note that you have a suite of capital and non-capital aged care related assets and a mixture of insourced and outsourced services.

You have established an Aged Care Services Community Reference Group with the intention of reviewing the Aged Care Services administered by the Shire; this group is overseeing the engagement of a suitably qualified consultant to perform the review.

The purpose of the review is to determine (1) what services should be delivered within the Shire to meet the Shire's objectives and (2) what body or bodies are best suited to deliver those services.

The review must include the following to achieve the proposed purpose:

- Collect and consider evidence and best practice models about how the Shire can best maintain, deliver and support the **current** services
- Advocate for the inclusion of further services in the community
- Examine topics critical to the Shire's objectives including but not limited to:
 - Social inclusion; social and civic participation
 - Built environment and transportation
 - Needs analysis
 - Future proofing
 - Intergenerational community support
 - Age appropriate health services
 - Demographic analysis including future projections / growth to 2045
- The role of the Shire in providing services post 2020

Our understanding of your requirements

Shire of Donnybrook Balingup
RFQ 198 - Aged Care Services Review

We also understand that you require the following in the review:

- 1 a review of the strengths, weaknesses, opportunities and threats inherent in the current services.
- 2 The cost-benefit and other holistic implications of transferring the management of all or part of the Shire's Services to a suitably qualified aged care provider/s
- 3 The financial and risk management implications of any recommendations including future short term and long term liabilities that will arise for the Shire with the current assets and services
- 4 alternative options for either management or provision of these services by another entity or entities provides a more effective long term sustainable (economic, social, environmental and governance) outcome for the community Shire of Donnybrook Balingup
- 5 A comparison of the current quality of services provided to other service models of a similar scale including those provided under the governance of Local Government Authorities will be provided where this information is obtainable
- 6 Provision of any other information considered appropriate for Council to consider as part of a comprehensive review of the Aged Care Services within the Shire. This will include consideration of the possible issues arising for the aged care sector from the recently announced Royal commission, changes in legislation in respect to compliance requirements
- 7 Consideration of the current cemeteries assets and associated issues

A valuable report will be one which enables the Shire of donnybrook / Balingup to pursue the optimal course of action with the requisite evidence for that course of action. Turner & Townsend and Paxon will succeed in providing you with what you require to make the right decisions.

Our proposed approach

Shire of Donnybrook Balingup
RFQ 198 - Aged Care Services Review

In this section we set out proposed approach to delivering on the requirements above.

Overarching methodology

In our experience, the approach developed by the Harvard School of Government is the most beneficial for (1) understanding the task of the review and (2) for providing the public managers owning the review with the requisite confidence to make the right decision. It is called the strategic triangle for public managers and seeks to answer three key questions.

- 1) Is the proposed course of action *valuable*? I.e. does the course of action recommended in the reporting provide the value that constituents in the community seek?
- 2) Is the proposed course of action *achievable*? I.e. do the operational capabilities exist for the Shire to actually achieve what the report is recommending? Are there sufficient resources available and sufficiently capable managers to oversee their use?
- 3) Is the proposed course of action *authorisable*? I.e. is there enough evidence (in the report) to comprehensively justify the recommended path. Can those entrusted with making the decisions do so with absolute confidence?

In sum – is it valuable, is it achievable, is it authorisable? Our task is to enable you to comprehensively answer all three.

We will divide the commission into 7 deliverables to aid in manageability and communication of the process to stakeholders. The deliverables are largely sequential however some tasks may be performed in parallel to ensure time frames are met. Note that some of the early outputs will require endorsement by the Aged Care Services Manager, the Reference committee or the Council.

Deliverable 1 – Preliminaries/Project Start up

- Establish project governance
- Develop a detailed program of work, including agreement and refinement of timelines and deliverables.
- Develop a value framework (also known as a benefit framework). This is a set of approximately 30 tangible values that clearly set out what is valuable/beneficial to the Shire in relation to aged care. The values will span multiple categories and are prioritised – see appendix 1. This value list will be used for assessing options, identifying risks, and evaluating future success. It also serves as a basis for assessing strengths, weaknesses opportunities and threats.
- Understand project stakeholders and develop stakeholder management plan
- Develop communication plan
- Confirm main issues and areas of concern re aged care and cemetery management
- Perform brief project risk and issue assessment and mitigate/resolve as needed
- Gather financial data and previous reports relevant to the project
- Establish the template report

Our proposed approach

Shire of Donnybrook Balingup
RFQ 198 - Aged Care Services Review

-
- Documentation of Council dependencies

Deliverable 2 – Identify Best Practice and Benchmark

- Assemble research on best practice in aged care and collate for presentation in review
- Obtain benchmarking data on other local government providers (where obtainable) in relation to (1) service provision and (2) financing
- Reference back to the value framework
- Use the value framework to develop a service maturity model for analysis of current state. Service maturity model to provide clarity on core KPIs – safety, quality, efficiency and workforce

Deliverable 3 – Needs analysis

- Perform demographic analysis to determine aged care service needs out to 2045
- Perform analysis of other needs that may impact on the aged care services offerings

Deliverable 4 – Analyse current state

- Analyse capability of Shire (and partners) to meet aged care service needs over the term (supply analysis)
- Use the service maturity model to assess current state of service delivery to determine whether there is an urgent/pressing need for change
- Use the value framework to assess strengths, weaknesses, opportunities and threats
- Review current Australian Aged Care Quality Accreditation compliance
- Analyse current assets (Asset condition report and Maintenance liability report)
- Analyse current operational costs (Revenue & Government Funding, Costs (e.g. detailed costed roster), Inflation, Service Parameters, Bed Configuration, Service Mix, Supported resident/Concessional Ratio, Market Parameters, RAD Values, RAD / DAP Uptake, Resident Attrition, Occupancy)

Deliverable 5 – Options development

- Develop long and short list of options which may include the following:
 - Continuation of existing Shire services
 - Expansion, growth, reduction or adaptation of existing Shire services
 - Part or whole transition to other service providers
 - Establishment of new or additional services, programs or facilities

Deliverable 6 – Options Analysis

- Perform a cost benefit (cost value) analysis of the identified options analysis using the value assessment framework and a rigorous financial and risk analysis as per the methodology in appendix 2

Deliverable 7 – Report

- Deliver a draft report for review by the Shire outlining the work conducted, the research, findings and recommendations. The report will rank the identified options and recommend the preferred option based the financial evaluation, risk assessment and impact of the cost-benefit analysis conducted
- Perform required iterations to the report based on stakeholder feedback
- Present a final version of the report. This will include all research and working documents that support the findings and recommendations made, including the financial model

Our proposed approach

Shire of Donnybrook Balingup
RFQ 198 - Aged Care Services Review

- Present the report to the committee and other Shire forums as requested

Further notes:

Cemeteries

We note there is little mentioned around what is required in the review regarding cemeteries and cemetery management. We suspect the Shire is considering some of these primary issues:

1. maintenance of grave site records and associated tracking of Next of Kin
2. administrative costs of above
3. cemetery location and impact on long term Shire planning
4. long term cost of maintenance
5. site contamination

Dependencies

In order to produce the report we require a number of inputs from the Council. If these are not met in a timely manner it will threaten the production schedule and may have an impact on cost. Inputs include:

- Endorsement of the preliminary outputs mentioned above, e.g. governance framework, stakeholder plan, communication plan
- Provision of previous reviews
- Provision of financial records relating to aged care services and cemetery management
- Access to sites

We will document the dependencies early in the program to assist the Council in understanding the requirements and delivering on them.

Selection Criteria - Qualitative

Shire of Donnybrook Balingup
RFQ 198 - Aged Care Services Review

In this section we introduce the primary team and address the qualitative selection criteria.



Jeremy Burtenshaw

Associate Director – Turner & Townsend

Jeremy specialises in health and aged care facility development and activation. Jeremy is currently Regional Health and Aged Care Sector Lead for Turner & Townsend in Western Australia, performing executive health advisory on major infrastructure projects including operational reform, business cases and facility/asset management.

Jeremy's role in this commission will be principal report writer and project lead.



Rosemary Hogan

Senior Consultant – Turner & Townsend

Rosemary is a nurse with an extensive and successful history of senior management roles in major hospitals and nursing service provision in metropolitan, regional, rural healthcare and aged residential care facilities and home care services.

Rosemary's role in this commission is aged care subject matter expert.



Donelle Rivett

Senior Manager – Paxon Group

Donelle specialises in the health and aged care industries, with a focus on clinical, financial analysis, operational management and senior leadership skills. She is experienced in the identification and development of new aged care, health, education and community care services. Donelle has a many years' experience in community development and stakeholder consultation.

Donelle's role in this commission is financial & risk analysis.

Selection Criteria - Qualitative

Shire of Donnybrook Balingup
RFQ 198 - Aged Care Services Review

Additional Contributors are:

<p>Sean Freyne Project Director, Turner & Townsend</p>	<p>Sean is a licensed Surveyor with an extensive knowledge of programme and project delivery in construction and commercial real estate development. He has worked in roles for both the client and as a consultant which has enabled him to develop an excellent understanding of the key criteria required by clients in construction management and real estate development across a wide range of sectors.</p> <p>Sean will perform the capital valuation, asset condition and maintenance liability report of the Shire's aged care facilities for integration into the financial analysis.</p>
<p>Michael Palassis Executive Director, Paxon Group</p>	<p>Michael is a nationally recognised leader in commercial and financial advice for health and aged care projects. Michael has advised on over \$12 billion of health projects over the past 5 years. Michael's expertise often sees him appointed to expert roles involving health feasibility and planning. Recent expert appointments include as an independent expert for the NSW Supreme Court failed private hospital case and for NSW Ministry of Health to expert review a new whole-of-State clinical services planning tool.</p>
<p>Santosh de Souza Senior Manager, Paxon Group</p>	<p>Santosh is Paxon's lead financial analyst and provides in-depth financial modelling to support complex and detailed health and infrastructure projects. Santosh provides analyst roles across a number of sectors, including healthcare, transport and infrastructure.</p>

Past Experience and Performance – 50%

The relevant past experience of the proposed personnel is set out below. Only the most recent experience is provided. For full details please refer to the personnel CVs in appendix 3.

Jeremy Burtenshaw

Client & Project	Role	Referee
<p>Southern Cross Care <i>Southern Plus East Fremantle Facility Commissioning</i></p>	<p>Project Director – facility commissioning. Role encompassed end to end service design, recruitment, program management.</p>	<p>Carole Bain General Manager Operations Carole.Bain@scrosswa.org.au</p>
<p>Building Queensland <i>Peer review Logan hospital Redevelopment Business Case Review</i></p>	<p>Senior reviewer – review of the \$1b preliminary business case against the Building Queensland investment management framework.</p>	<p>On request</p>

Selection Criteria - Qualitative

Shire of Donnybrook Balingup
RFQ 198 - Aged Care Services Review

Department of Finance <i>QEIMC Shared Services Business Case</i>	Development of a \$50m business case for the sharing of all non-clinical and para-clinical services across the QEIMC campus (including Perth Children's Hospital and Sir Charles Gairdner Hospital)	Trudy Grimshaw Director Project Controls Trudy.grimshaw@finance.wa.gov.au
Department of Finance <i>State Advisor: Facilities Management</i>	Senior Advisory to the Department of Finance on all aspect of facility transition and asset management.	John Dransfield Director Commissioning John.Dransfield@finance.wa.gov.au

Rosemary Hogan

Client & Project	Role	Referee
<i>Southern Cross Care</i>	Deliver on multiple projects at Southern Cross care including the introduction of a clinical reporting system for incidents. Management of Clinical Governance processes	Carole Bain Southern Cross Care cbain@scrosswa.org.au 0490 432 012
<i>RDNS (now known as Bolton Clarke)</i>	Deliver on successive successful applications for CACPs, EACH and EACH-Dementia packages in highly competitive markets a situation that RDNS had been unable to achieve prior to my arrival, generating revenue in excess of \$1.5M	Stelvio Vido Former Executive General Manager RDNS svido1@bigpond.com 0428 555 727
<i>RDNS</i>	Turned around the Customer Service Centre (RDNS's centralised telephony intake and support service) to a steady state operating with high end call centre performance standards (example 80% of calls answered within 30 seconds and 85% of customers rating their experience as highly satisfied), that operates 24/7 365 with consistent fail safe operating procedures, handling 40,000 calls and 10,000 fax's each month	Stelvio Vido As above.

Donelle Rivett

Client & Project	Role	Referee
Government of NSW NSW Health	Paxon provided commercial and financial advice on the transaction options for the restructuring / outsourcing / sale of over 3,000 residential aged care beds and associated services in regional NSW	Troy Harvey Senior Project Director NSW Health Infrastructure troy.harvey@hinfra.health.nsw.gov.au

Selection Criteria - Qualitative

Shire of Donnybrook Balingup
RFQ 198 - Aged Care Services Review

Silver Chain Nursing Association <i>Service Agreements for Silver Chain</i>	Paxon was the financial and commercial advisor for the development of new service-level agreements with Government agencies for home care services	Chris McGowan CEO Silver Chain Nursing Association ceo@silverchain.org.au
Bethesda Health Care <i>Feasibility for New Aged Care Facility</i>	Paxon provided financial analysis and development of feasibility study for a new residential aged care facility.	Dr Neale Fong Chairman Bethesda Health Care nfong@bethesda.org.au
WA Country Health Service <i>The Economics of Aged Care</i>	Paxon provided financial advice on the impact of changing aged care models of care across sites in the South West, Midwest, Great Southern, and Wheatbelt.	Jeff Moffet CEO WA Country Health Service Jeff.moffet@health.wa.gov.au

Current Capability

Details on the proposed resource skill, experience and qualifications is provided below.

Resource	Principal Skills	Qualifications & Sector Experience
Jeremy Burtenshaw, T&T	<ul style="list-style-type: none"> ▪ Business Case Development ▪ Contract administration and management ▪ Risk and Issue Management ▪ Business process improvement (LEAN) ▪ Senior program and project management ▪ Senior stakeholder and change management ▪ Business performance management ▪ Disaster management and business continuity planning ▪ Healthcare policy development, planning and clinical governance ▪ Business operating models 	<ul style="list-style-type: none"> ▪ Bachelor Nursing ▪ Bachelor Philosophy ▪ 10 years health and aged care sector experience
Rosemary Hogan, T&T	<ul style="list-style-type: none"> ▪ Contract administration and management ▪ Risk and Issue Management ▪ Business process improvement ▪ Deep and broad understanding of the Aged care sector 	<ul style="list-style-type: none"> ▪ Registered Nurse ▪ Grad. Diploma Women's Health ▪ Master Business Administration ▪ 30 years health and aged care experience
Donelle Rivett Senior Manager Paxon Group	<ul style="list-style-type: none"> ▪ Stakeholder consultation ▪ Policy and program review ▪ Policy and program development ▪ Business case development and applications for capital project funding ▪ Service model design and review ▪ Operating model design and review 	<ul style="list-style-type: none"> ▪ Bachelor of Science ▪ Bachelor of Nursing ▪ Master Business Administration (Executive) ▪ Graduate Certificate in Research and Commercialisation ▪ 18 years health and aged care sector experience
Sean Freyne, Project Director T&T	<ul style="list-style-type: none"> ▪ Building surveying ▪ Programme and Project Management ▪ Development Management ▪ Construction Management ▪ Tendering & Procurement ▪ Stakeholder Engagement and Management ▪ Project Risk Management ▪ Contract & Third Party Negotiations 	<ul style="list-style-type: none"> ▪ Bachelor of Science Degree - Building ▪ Surveying ▪ Advanced Diploma of Programme Management (Current Study) ▪ Diploma of Project Management ▪ BTEC HNC Building Studies ▪ BTEC ONC Building Studies

Selection Criteria - Qualitative

Shire of Donnybrook Balingup
RFQ 198 - Aged Care Services Review

		<ul style="list-style-type: none"> ▪ MAIPM (Member of the Australian Institute of Project Management) ▪ ICIOB (Incorporated Member of the Chartered Institute of Building).
Michael Palassis, Executive Direction Paxon Group	<ul style="list-style-type: none"> ▪ Funding and financing of aged care and health projects and services ▪ Financial modelling and analysis of health care ▪ Performance improvement ▪ The development of collaborative ventures between Government and the Private Sector, such as PPPs ▪ Feasibility and business case development 	<ul style="list-style-type: none"> ▪ Bachelor of Commerce (Hons) ▪ Bachelor of Laws ▪ Graduate Diploma in Applied Finance and Investment ▪ Masters of Applied Finance
Santosh De Souza Senior Manager Paxon Group	<ul style="list-style-type: none"> ▪ Business case and strategic development ▪ Corporatisation and Privatisations ▪ Economic evaluation of investment options and long-term resource management strategies ▪ Efficiency of cost structures ▪ Funding and financing ▪ Financial structures ▪ Joint venture projects ▪ Needs and Options Assessment ▪ Risk modelling 	<ul style="list-style-type: none"> ▪ Bachelor of Commerce ▪ Bachelor of Engineering

Availability

We confirm that our nominated team is available to deliver the report in the project schedule provided in section 6 of the RFQ. Note that these availability statements are correct at the time of submission and are subject to change.

Resource	Current utilisation in the period	Availability for this RFQ - Aged Care Services Review Project
Jeremy Burtenshaw, T&T	30%	70%
Rosemary Hogan, T&T	70%	30%
Donelle Rivett, Paxon	50%	50%
Grant Stevenson, T&T	70%	30%
Michael Palassis, Paxon	70%	30%
Santosh De Souza, Paxon	50%	50%

Selection Criteria - Quantitative

Shire of Donnybrook Balingup
RFQ 198 - Aged Care Services Review

Personnel fees

The personnel fees for the lump sum.

Personnel Fees	Indicative hours	Hourly rate ex GST	Total cost ex GST	Total Cost Inc. GST
J Burtenshaw, Turner & Townsend	120	\$150	\$18,000	\$19,800
R Hogan, Turner & Townsend	120	\$150	\$18,000	\$19,800
D Rivett, Paxon	100	\$230	\$23,000	\$25,300
S Freyne, Turner & Townsend	24	\$200	\$4,800	\$5,280
Michael Palassis, Paxon	10	\$325	\$3,250	\$3,575
Santosh De Souza, Paxon	50	\$250	\$12,500	\$13,750
Total			\$79,550	\$87,505

Disbursements

Resource	Item	Units	Total cost ex GST	Total Cost Inc GST
J Burtenshaw	Return trips ex Perth @ \$264 per trip	6	\$1,584	\$1,742
J Burtenshaw	Accommodation @ \$200 a night	6	\$1,200	\$1,320
S Freyne	Return trips ex Perth @ \$264 per trip	1	\$264	\$264
S Freyne	Accommodation @ \$200 a night	1	\$200	\$200
R Hogan	Return trips ex Perth @ \$264 per trip	6	\$1,584	\$1,742
R Hogan	Accommodation @ \$200 a night	6	\$1,200	\$1,320
Paxon disbursements incorporated into resource hours.			\$0	\$0
Total			\$6,032	\$6,588

Selection Criteria - Quantitative

Shire of Donnybrook Balingup
RFQ 198 - Aged Care Services Review

Total Fee

Totals	Total cost ex GST	Total Cost Inc GST
Personnel Fees	\$78,950	\$86,845
Disbursements	\$6,032	\$6,588
TOTAL	\$85,582	\$94,093

Fee notes

The fixed price fee:

- Is based on the program, duration and milestones in the program provided in the RFT
- Is based on the performance by the Council of the agreed dependencies

Other requirements

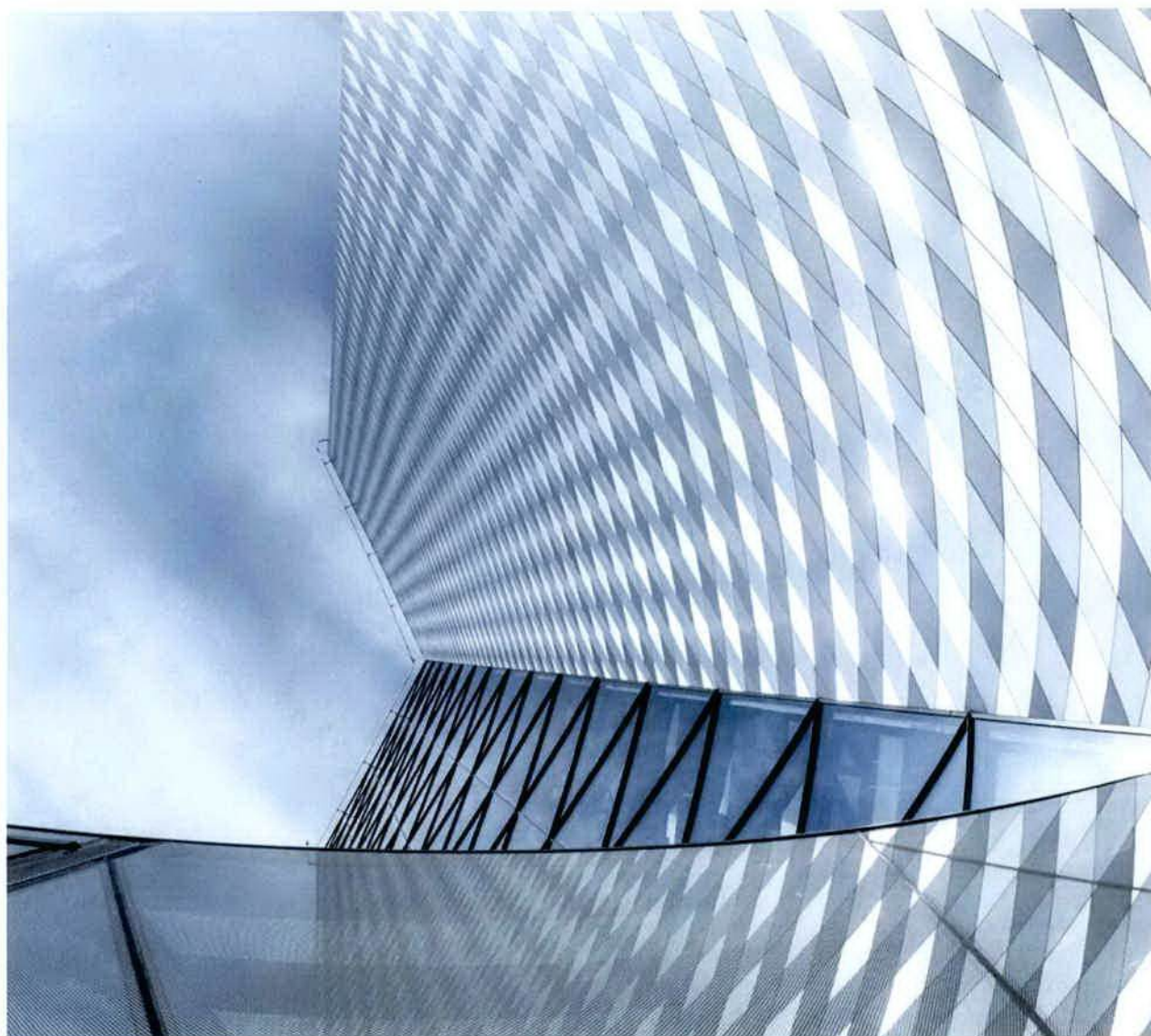
Our requirements include:

- Council meeting rooms for stakeholder meetings and presentations

Consultant Contract

Turner & Townsend has reviewed (1) the RFQ and (2) the Standard GCC under PO. While we are in general agreement with the Terms and Conditions set out in this proposed contract, there are some points of detail which we would wish to discuss with you prior to entering into contract.

Appendices



Appendix 1 – Value Framework

Shire of Donnybrook Balingup
RFQ 198 - Aged Care Services Review

The value framework is a critical document that captures and clarifies what the Shire values in relation to aged care. It is generally an extract and confirmation of work already performed by the Shire. Its purpose is to (1) enable shared clarity about the purpose of the commission (2) perform as the primary reference point for all analyses and recommendations.

Categories may include:

- Health and safety
- Quality of life
- Accessibility, including built environment and transportation
- Development goals of the Shire
- Environment and heritage
- Sustainability
- Indigenous communities
- Law and order; and
- Intangible economic (such as business confidence).
- Social inclusion; social and civic participation
- Future proofing
- Intergenerational community support

Example values may be:

- Community members are supported to age and die in the community they call with minimal trips to city based services
- Access to aged care services is equitable irrespective of cultural background, financial means or current health condition.
- The financing of aged care services is sustainable in the long term.

Approximately 30 values are generally identified. Each value is prioritised according to its significance and then used to assist in risk identification.

Appendix 2 - Financial Evaluation Methodology

Shire of Donnybrook Balingup
RFQ 198 - Aged Care Services Review

Financial Evaluation Methodology

Paxon Group will undertake financial evaluation, risk assessment and cost benefit analysis of future aged care options developed through consultation and data analysis.

For financial evaluation, Paxon will develop a 3- way Financial Model that includes the following key elements to assist in a financial evaluation of each identified options:

- Income statement projections showing detailed:
 - funding and revenue (including modelling the impact of any federal funding reform and changing community needs);
 - operating cash flows (demarcated into employment costs and other goods and services costs);
- Balance sheet and cash flow projections;
 - Assessment of key financial metrics including:
 - Project internal rate of return (IRR);
 - Payback period;
 - Net present value (NPV);
 - Return on investment;
 - Return on equity;
 - Interest coverage ratio; and
 - Debt service coverage ratio
- Paxon will also conduct sensitivity analysis on the assumptions utilised in the cash flow modelling. The key assumptions that will be tested include:
 - Demand and occupancy;
 - Revenue / funding rates;
 - Capital cost;
 - EBITDA margin; and
 - Financing decisions (including evaluation of leasing scenarios).

Risk assessment pertaining to each option, will be undertaken and include an analysis of the following risks:

- Financial;
- Economic;
- Social;
- Governance; and
- Environmental.

Appendix 2 - Financial Evaluation Methodology

Shire of Donnybrook Balingup
RFQ 198 - Aged Care Services Review

For each identified option Paxon will determine each of the following financial costs (pertaining to the risk simulation):

- Retained risks; and
- Transferred risks.

Paxon will provide a summary of key risks that are critical to differentiate the success of the investment in relation to the project options considered including the financial and risk management implications of any recommendations.

Finally, a financial assessment of the identified benefits pertaining to each identified aged care option will be undertaken including:

- Identification of the strengths, weaknesses, opportunities and threats;
- Identification of a cost and benefit assessment on social impact categories including:
 - Health and safety;
 - Quality of life;
 - Development goals of the Shire;
 - Environment and heritage;
 - Sustainability;
 - Indigenous communities;
 - Law and order; and
 - Intangible economic (such as business confidence).
- Determination of the Net Present Value: calculated as the sum of the discounted benefits, less the discounted costs of each option;
- Determination of the Benefit Cost Ratio: calculated as the ratio of the present value of benefits to the present value of costs; and
- Determination of Internal Rate of Return: calculated as the discount rate which equates the present value of benefits with the present value of the costs.

Appendix 3 - Curricula Vitae

Shire of Donnybrook Balingup
RFQ 198 - Aged Care Services Review

CV

Jeremy D Burtenshaw



Discipline

Healthcare & Aged Care
Strategy & Change

Grade

Associate Director

Qualifications

Bachelor Nursing (1993)
Bachelor Divinity – theology/philosophy
(2000)
Bachelor Psychology (in progress)

Regional experience

Australian Healthcare - metropolitan,
regional and remote: 10 years.

Australian Non Profit: 10 years.

Capability summary

Jeremy is a senior health service manager with a clinical background specialising in facility activation and operational design & management. He is a dedicated, relational and strategic leader with extensive training and broad experience in the private, public and non-profit sectors.

Jeremy is currently Regional Health and Aged Care Sector Lead for Turner & Townsend in Western Australia.

In the ten years prior Jeremy has been

- Project Director on the commissioning of the Kaleeya Hospital Redevelopment for Southern Cross Care
- State Advisor on FM transition, training and shared services for the WA Department of Finance
- Transition Manager and Business Performance & Reporting Manager for Serco on the Fiona Stanley Hospital Commissioning.

At the senior manager level in the public service Jeremy served in a variety of roles including contract management, disaster management, clinical planning and disease control. Key capabilities in healthcare leadership were evidenced in major projects including:

- Management of the WA distribution of PanVax and antiviral agents for PH1N1
- Major reform of the WA Health's incident notification processes & systems.
- Development of the Interim Health Business Continuity Plan for CHOGM.

Jeremy's earlier engagement in the non-profit sector rounds out his experience and was the origin of his commitment to empowering organisations and individuals to achieve their objectives.

Jeremy D Burtenshaw

Key technical competencies

- Senior leadership in large and complex organisations
- Business cases and executive decision support
- Facility activation and management
- Program and project management
- Stakeholder and change management
- Business performance management
- Disaster management and business continuity planning
- Healthcare policy and planning
- Risk and issue management
- Business analysis and reporting
- Contract administration and management
- Business Process Improvement

Highlighted sector experience

- Healthcare sector
- Non-profit sector

Systems and tools capability

- Aconex (experienced)
- MS Office suite (experienced)
- FileMaker Pro (experienced)
- MS Project (experienced)
- Adobe InDesign (experienced)

Training

- Managing Successful Programs - Practitioner
- WA Health Emerging Leaders Program
- Australasian Inter-service Incident Management System (AIMMS)
- Major Incident Medical Management and Support (MIMMS)
- Emergency Management Australia – Business Continuity
- Emergo Train - Practitioner
- Clinical Pastoral Education

Linked in:
<https://au.linkedin.com/in/jeremyburtenshawaustralia>

Aged Care

Southern Cross Care

Project: Southern Plus East Fremantle Residential Aged Care Facility Commissioning

Role: Project Director 2017-2018

- Project direction on all aspects of the commissioning of the former Kaleeya Hospital into an 83 bed residential aged care facility.
- Oversight and delivery of program including procurement, deployment, service design, workforce modelling, revenue modelling, workforce design, recruitment, training and go live.
- Direction of all aspects of program delivery and project management, including planning, cost control, risk management, and issue management.
- Development of 11 operational service plans for the client detailing all operational activity for the facility: clinical service, food service, laundry service, cleaning service, management service, hospitality service, external waste service, internal waste service, supplies service, ICT service, activities/lifestyle service.
- Development of the 'Southern Plus Way' - a document setting out the way in which personnel achieve the facility vision for 'life in full'.
- Development of a vendor managed imprest model for the whole of the Southern Cross Care organisation.

Health

Building Queensland

Project: Gap Analysis Logan Hospital Redevelopment Business Case

Role: Principal Reviewer 2017

Advisory Services to analyse the adequacy of the Logan Hospital and Health Service Preliminary Evaluation against the requirements BQ Business Case Development Framework for the Logan Hospital Redevelopment.

Jeremy D Burtenshaw

Department of Treasury, Government of Western Australia.

Project: Perth Children's Hospital

Role: State Advisor - FM Transition and Training, WA Department of Finance on the PCH project. (2016, 9 months)

- Development of FM operating models FM for NMHS
- Authoring and implementation of the FM transition plan
- Chair of the CAFM implementation group
- Chair of the FM transition group
- Advisor / PM for FM and base build training
- Primary liaison between the Contractor and the Owner for all FM and base build training requirements
- Oversight of all PPM submission by the contractor, including quality assurance and handover

Role: State Advisor - Shared Services – WA Department of Finance (2015-2016, 3 months)

- Strategic analysis and business case on a c.\$50m non-clinical and para-clinical services reform project for two area health services (3 months) at the QEIIIMC campus.

Serco ASPAC

Project: Fiona Stanley Hospital, Perth, Western Australia.

Role: Business Performance and Reporting Manager. 2015

- Strategic management of the implementation of the Fiona Stanley Hospital Facilities Management Services contractual performance management regime across 25 services, 460 KPIs and 4,500 available rooms
- Management of contractual compliance with and auditability of the performance regime
- Management of the abatement reclassification process
- Risk and issue management pertaining to business performance and reporting
- Production of all external reports, including monthly and annual contractual reports,

monthly divisional performance reports, and other reports as requested by the client.

Role: Transition Manager 2012-2015

Program management and leadership of the phased opening of Fiona Stanley Hospital in Perth, Western Australia for Serco ASPAC.

- Oversight of the readiness of clinical and non-clinical spaces to commence operations according to WA Health's phased commissioning program (approximately 6000 rooms).
- Management of multiple subcontractors performing space readiness works (e.g. specialist equipment installers, environmental testing).
- Strategic development and management of 26 stakeholder engagement forums to ensure comprehensive integration between clinical (WA Health) and non-clinical (Serco) teams to achieve readiness.
- Oversight of internal transition change communications using multiple methodologies including 'town hall meetings' and written updates to the Serco team.
- Oversight of transition program governance, including chairing and administration of the Transition Specialist Advisory Working group and Site Control Group.
- Oversight of major transition governance artefacts and reviews, including Serco Group Gate Reviews.
- Environmental commissioning of specialised spaces including theatres, aseptic suites and oncology.
- Support to deed negotiations to determine Service activity levels in the phased opening.

Awards:

- Serco National Pulse Award - Serco FSH Transition Leadership Team
- 2014 Australian Business Award for Project Management - Fiona Stanley Hospital (Excellence in Project Management)

WA Health, South Metropolitan Health Service

Project: Fiona Stanley Hospital, Perth, Western Australia.

Role: Estates Manager and Director Facilities Management 2011-2012

Jeremy D Burtenshaw

Contractual oversight of the Hard FM components of the Facilities Management Services Contract for Fiona Stanley Hospital.

Other key responsibilities included:

- Chair of the clinical and non-clinical Specialist Advisory Working Groups for the procurement of FF&E.
- Strategic Asset Management & chair of the Asset Management Working Group
- Contractual management of the Facilities Manager's procurement activities for architecturally significant medical equipment, e.g. MRI, CT, Mammography, X Ray, and Fluoroscopy.

WA Health, Public Health Division, Perth, Western Australia.

Role: Senior Policy Officer 2009-2011

Manager and senior policy officer responsible for emergency service planning, business continuity planning, policy development and strategic advice on disaster management, public health and health logistics to all WA hospitals and other non-health disaster management agencies.

Major projects included:

- Management of the WA distribution of PanVax and antiviral agents for PH1N1
- Reform of the state's incident notification processes and systems
- Reform of public health communication processes with the GP sector
- Reform of hospital based emergency response capabilities.

In addition, performed as WA Health On Call Clinical Officer, provide a first point of contact service for the Department of Health for all clinical advice and health service coordination in major incidents.

WA Health, Clinical Safety and Quality, Perth, Western Australia.

Role: Senior Program Officer 2009

Responsible for strategic projects to enhance the system wide establishment of clinical best practice and quality and safety initiatives.

WA Health, Public Health Division, Perth, Western Australia.

Role: Senior Project Officer 2007-2008

Responsible for developing pandemic response plans for the all WA hospitals, and assessing hospital preparedness for a pandemic.

Mercy Health Care, Balgo Hills Medical Clinic, Balgo, Western Australia

Role: Remote Area Nurse 1998-1999

Remote Area Nurse responsible for the provision of a daily medical clinic, primary health program and emergency clinical services for the Kukatja people in the Kutjungka region.

Fremantle Hospital, ED & General Wards Fremantle, Western Australia

1995-1998

General nurse responsible for tertiary nursing care in a variety of clinical settings including orthopaedics, plastics, general medical, general surgical and emergency.

Publications

2009

Tarun S. Weeramanthri, Andrew G. Robertson, Gary K. Dowse, Paul V. Effler, Muriel G. Leclercq, Jeremy D. Burtenshaw, Susan J. Oldham, David W. Smith, Kathryn J. Gatti and Helen M. Gladstones. **Response to pandemic (H1N1) 2009 influenza in Australia – lessons from a State health department perspective.** Australian Health Review, 2010, 34, 477-486

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CV

Rosemary Hogan



Discipline

Advisory

Grade

Senior Consultant

Qualifications and awards

Executive MBA

Grad Dip Bus

Grad Dip Women's Health

Cert Advanced Nursing

Cert Midwifery

Cert General Nursing

Capability summary

Rosemary is a nurse with an extensive and successful history of senior management roles in major hospitals and nursing service provision in metropolitan, regional, rural healthcare and aged residential care facilities. Each role has been hallmarked by significant growth in service provision as well as a commitment to ongoing professional development of staff and students.

Major achievements include

- Successful management of residential aged care facilities during a period of significant industry change
- Successful management and leadership to over 1100 staff delivering homecare services
- Expansion of RDNS services nationally including expansion RDNS Institute of Community Health
- Developing and expanding a major call centre for state and national service delivery
- Identifying and implementing major efficiency improvements at 4 separate services

Rosemary Hogan

Key technical competencies

- Clinical Advisory
- Clinical business case
- Project management
- Clinical research

Highlighted sector experience

- Head of Clinical Care
- Head of Care – Residential
- General Manager – Services for Older People
- Advisor Minister for Health and Ageing
- Executive General Manager – Service Delivery
- Deputy CEO
- Health Service Development
- Director, Clinical Support Services
- Director, Integrated and Sub-acute Care
- Director of Nursing (subacute)
- Group Mgr Residential Services
- Deputy Director Nursing
- Divisional Director Maternity Services
- Unit Manager, Delivery Suite

Head of Clinical Care Southern Cross Care WA April 2017 –

Company Overview

Southern Cross Care WA is one of WA's larger aged residential, home care and retirement living providers and services 3,000 plus clients each year. SCC employs over 1200 people to meet the needs of older West Australians living in Perth and regional areas. This newly created position was created to provide leadership to the organisation to ensure we provide the highest level of clinical care, to enhance the quality of life and well-being of the people we care for.

Position / role overview

Implement and monitor contemporary and innovative models of clinical and dementia care across residential aged care facilities, mental health and home care to meet regulatory requirements and ensure consistency of the client experience

Develop and implement an integrated continuum of person-centred services to meet the needs of our clients in residential aged care facilities, mental health and home care setting in line with our strategic direction

Achievements to date

Implementation of a clinical governance framework to encompass the whole organisation

Head of Care – Residential Southern Cross Care WA August 2014 – April 2017

Position / role overview

- Member of the senior leadership team with operational and clinical leadership and stewardship
- Leading SCC care service provision for eight (8) residential care facilities with some 400+ beds and an operating budget of approximately \$35M (comprising fees and charges and Government subsidies) per annum plus accommodation payments,

Achievements

Rosemary Hogan

- Improving the organisational response to the Living Longer Living Better reform opportunities in residential and care
- Implementation of a range of clinical governance activities including but not limited to benchmarking and the development of Clinical Quality Improvements inclusive of falls and skin tear prevention programs

General Manager – Services for Older People Jewish Care Victoria May 2013 – Aug 2014

Company Overview

Jewish Care Victoria provides a wide range of services to the Jewish community and employs over 600 staff. Most of the clients served are older and receive funding through a variety of funding arrangements including Home and Community Care, Community Aged Care Packages (CACPs) and Extended Aged Care at Home packages (EACH) and Residential Aged Care.

Position / role overview

- Member of the senior leadership team with operational and clinical leadership and stewardship this has included being the Acting Chief Executive Officer (CEO) during the CEO's leave
- Leading Jewish care service provision for four residential care facilities with some 342 beds and an operating budget of approximately \$27M (comprising fees and charges and Government subsidies) per annum plus accommodation bonds,
- Leading Jewish care service provision in Home Care package (Levels 1 & 2, CACPs, EACH and EACH-D), Home and Community Care services and programs, a small National Carers Respite program and Holocaust Survivors program, operating budget approx. \$7M per annum

Achievements

- Successful implementation of Consumer Directed Care packages
- Prompt initiation of the organisational response to the Living Longer Living Better reform opportunities including Dementia

Supplement Assessments in residential and community care

Advisor Minister for Health and Ageing Victoria February 2013 – May 2013

Position / role overview

- Short term contract position to the Minister for Health, Victoria providing policy advice on workforce and aged care matters

Executive General Manager – Service Delivery, Deputy CEO RDNS August 2007 – November 2012

Company Overview

RDNS provides home based care to over 39,000 clients each year and employs over 1,700 staff, 1,300 of whom are nurses. Most RDNS clients are over the age of 65 and receive care through a variety of funding arrangements including Home and Community Care, Community Aged Care Packages (CACPs) and Extended Aged Care at Home packages (EACH). While those under 65 have a range of disabilities or are on Hospital in the Home programs. RDNS has during my period of leadership expanded considerably and now operates in all Australian states and New Zealand as well as providing national telephone services.

Position / role overview

- Member of the senior leadership team with operational and clinical leadership and stewardship
- RDNS service provision in Victoria and Tasmania, inclusive of both clinical service provision and professional leadership of the health professionals including allied health practitioners and nurses for the whole organization with responsibility for an operating budget of \$95M and over 1300 staff providing care to 37,000 clients.
- RDNS Institute of Community Health, the Research, Education and Training arm of RDNS operations.

Rosemary Hogan

- The Customer Service Centre a 24/7 contact (call) centre providing tele-health services and telephony support nationally and internationally for RDNS and subcontracted services.
- **Achievements**
- Acting CEO during CEO absences including 16 weeks between CEO's maintained the Board's agenda and the organization's strategic plan including presenting the 2011-12 budget to the Board,
- Deliver on successive successful applications for CACPs, EACH and EACH-Dementia packages in highly competitive markets a situation that RDNS had been unable to achieve prior to my arrival, generating revenue in excess of \$1.5M,
- Turned around the Customer Service Centre (RDNS's centralised telephony intake and support service) to a steady state operating with high end call centre performance standards (example 80% of calls answered within 30 seconds and 85% of customers rating their experience as highly satisfied), that operates 24/7 365 with consistent fail safe operating procedures, handling 40,000 calls and 10,000 fax's each month,
- Lead the establishment of a national contact centre service for the National Health Contact Centre Network (this service provides 24 hour counseling and information on pregnancy, birth and babies up to 12 months of age) delivering on extremely tight timeframes (notification of tender success to service commencement 10 weeks and inclusive of specialist staff recruitment and training) while adhering to rigorous contact centre disciplines,
- Oversaw the development of interstate services in Tasmania in 2009 and New South Wales in 2010. In Tasmania this was a state wide telephony referral centre and in NSW the services developed were inclusive of nursing care domestic assistance and personal care in Sydney and Wollongong,
- Sponsored internal efficiency reviews during 2011-12 that delivered \$1M in recurrent savings,
- Development of Enterprise Agreements in NSW and Tasmania that ensured RDNS offered attractive terms and conditions while remaining cost effective in tight labor markets and successful negotiation of the RDNS (Victorian employees) Collective Agreement in 2007 and in 2012,
- Championed the development of person-centred care and re-enablement models of care resulting in RDNS leading the policy directions for the Department of Health,
- Commissioned an extensive review of the RDNS Institute and implementation of the recommendations arising from the review. Since the review the RDNS Institute has gone onto be very successful in achieving Department of Health and Ageing competitive grant funding of approximately \$1 million for the period 2010-12 and published or presented in approximately 130 books, journal articles and conference presentations in nursing and health science leading to international recognition of RDNS and subsequent NHMRC grant success,
- Directed a dedicated group of nursing research professionals to expand our knowledge of nursing care in older people leading to national and international recognition especially in the form of a Federal Government grant of \$25 million to establish one of Australia's first Partnership Centres, the Wound CRC,
- Oversaw the RDNS clinical education component of in-service training, graduate nurse education and external consultancy program that increased in throughput by approximately 5% per year,
- Led two successful consultancy projects (development of the Dementia Practice Guidelines for HACC Assessment Services and the Connected Wound Care Project – that delivered to the Department of Health Victoria a state wide approach to the management of chronic wounds) both of which have been delivered on time and within budget. Subsequently these projects have recognised at the Australian Institute of Project Management (Victorian Branch) as winners in their respective categories,
- Submissions to Parliamentary committees of enquiry, preparation of discussion papers and industry publications. Most recent submission was to the Victorian Family and

Rosemary Hogan

Community Development Committee – Inquiry into Opportunities for Participation of Victorian Seniors at which I was invited on two occasions to talk to the Committee.

St Vincent's Health October 2005 – June 2007 Director, Health Service Development

Position / role overview

This position and role encompassed strategic, service and business planning for St Vincent's Health, management of the project office and facilitation and support of Government and stakeholder relations.

Achievements

- Facilitated strategic planning with the SVH Board that enabled the development of a focused approach to the development of orthopaedic surgery capacity and the development of Cancer Centre including refurbishment of facilities,
- Led the successful submission to the Department of Health and Human Services (now known as Department of Health) that resulted in significant \$8M upgrade to the Operating Suite,
- Championed the development of the rationale for the establishment of a new research centre that drew previously disparate research groups together. This has resulted in St Vincent's Health, The University of Melbourne, St Vincent's Institute of Medical Research, the O'Brien Institute, the Bionic Ear Institute and Australian Catholic University collaborating to develop the Aikenhead Centre for Medical Discovery,
- Sponsored the development of a federal government funded state-wide telephone service submission which was subsequently successful and implemented as the Dementia Behaviour Management and Advisory Service (DBMAS),
- Negotiated relationship agreements with University of Melbourne and the University of Notre Dame that facilitated new medical student placement arrangements during the

expansion of the University of Notre Dame into Victoria; and

- Participated in master planning at the request of DHS for two other health services which ultimately led to funding for redevelopment.

St Vincent's Health October 2004 – October 2005 Director, Health & Clinical Support Services, and Integrated and Sub-acute care

Position / role overview

These were roles undertaken temporarily whilst the incumbents were either being recruited for or on long service leave at the request of the CEO. The role of Director- Health Clinical Support Services included Engineering and Infrastructure, Pathology, Medical Imaging, Pharmacy at St Vincent's Health. During that time St Vincent's Health was either planning or undertaking a variety of capital works valued at \$25 million.

The role of Director – Integrated and Sub-acute care included site responsibility for the St George's campus, five residential facilities, extensive inpatients and outpatient allied health, subacute and geriatric medical services at both St Georges and the St Vincent's Fitzroy service.

Achievements

- Continuation of the capital works program including upgrades to building infrastructure, construction of an aged care residential facility without interruption or disruption to service delivery and the works program despite considerable upheaval in personnel,
- Comprehensive review of SVH private and public pathology services. The outcome of the review enabled the development of a significantly greater understanding of both external and internal drivers in the pathology market enabling SVH to ensure that the pathology service made a positive contribution to the operating budget of SVH.

Rosemary Hogan

**St Vincent's Health January 2003 –
October 2004 - Director of Nursing,
Group Manager Residential Services**

Position / role overview

Responsible for nursing services at St George's Hospital, the two sub-acute wards at St Vincent's Fitzroy, three aged care residential facilities and the Cottage, a residence that provided hospital in the home services for homeless people beds in total 210 . As with other previous roles I provided day to day operational leadership and support to the ward Nurse Unit Managers and After-hours Supervisors on management, clinical and staff related issues, this included providing a first response in the event of hospital emergencies e.g. fires, floods, electrical disruptions.

Achievements

- Delivering the nursing recruitment strategies with the Nurse Unit Managers that ensured that the nursing and allied health staff vacancy rate was substantially half the rate experienced in the sector at the time with some traditionally hard to recruit for areas, e.g. aged residential care having no vacancies.
- I project managed the planning processes including representing St Vincent's Health at the Victoria Civil and Administrative Tribunal for the construction of a 45 bed aged care residential facility. This facility was built on budget and within 4 weeks of the original scheduled due date.

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Donelle Rivett | SENIOR MANAGER

MBA, BN (Nursing), BSc (Microbiology), FCHSM, RN

drivett@paxongroup.com.au

Donelle has extensive experience in health and aged care industries, with a focus on clinical, financial and operational management and senior leadership skills.

She is experienced in the identification and development of new health, education and community care services.

Donelle has a many years' experience in community development and stakeholder consultation.

Donelle provides advice to Paxon clients on:

- Financial, feasibility analysis and modelling
- Business case development and applications for capital/project funding
- Commercial and new service strategy development
- Integration of health services and clinical governance.

Educational Qualifications

Donelle has obtained the following educational qualifications:

- Bachelor of Science University of Western Australia
- Bachelor of Nursing Edith Cowan University
- Master Business Administration (Executive) Notre Dame University Australia
- Graduate Certificate in Research and Commercialisation Curtin University..

Professional Associations

Donelle is a member of the following professional associations:

- Registered Nurse – APRHA
- Fellow - Australasian College of Health Service Management
- Fellow – Joanna Briggs Institute, University of South Australia.

Aged Care Experience

- **Bethesda Health Care** – developed a bankable feasibility study for a new residential aged care facility
- **Bethesda Health Care** – developed a feasibility study for the deployment of a home care enterprise to leverage existing hospital services
- **Chemo at Home Ltd** – provided financial modelling and commercial advisory services associated with the business development for a new home-based Chemotherapy enterprise
- **Government of NSW** – provided advice on the transaction options for the restructuring / outsourcing / sale of over 3,000 residential aged care beds and associated services in regional NSW
- **Hammond Care** – provided financial advisory services regarding the turnaround of subacute care services

- **Hammond Care** – provided financial modelling services regarding home and community care services
- **Home Hospital Australia** – provided mergers and acquisition advice for the consolidation of home hospital services providers
- **North Metropolitan Health Services** – business case development and financial model for Aged Care services at SCGH
- **Silver Chain** – provided financial and commercial advisory services regarding new service-level agreements with Government agencies for home care services
- **St Ives** – provided financial and commercial advisory services for the development of a bid to the Western Australian government for sub-acute and home care services in Western Australia
- **St John of God Health Care** – provided strategic and financial advisory services regarding the commercial options surrounding its Australian-wide home care business, Health Choices
- **St John Ambulance** – provided financial modelling and advisory services regarding the development of an Urgent Care and home care service model.

Health Experience

- **Bethesda Health Care** – feasibility study for new hospital service
- **Child and Adolescent Health Service (WA)** - lifestyle costing analysis of alternative procurement methods for medical equipment for the New Children's Hospital
- **Derbarl Yerrigan Health Service** – review of strategic options and review of clinical governance framework and operations for metropolitan wide Aboriginal Medical Services
- **Eastern Health and Monash Health** – financial modelling and feasibility study development to assist establish a centralised medical device sterilisation service across ten hospital sites (2,635 beds) in Melbourne
- **Headwest** – feasibility study and financial modelling for the establishment of a specialist GP practice for patients with disabilities in Western Australia
- **Mater Health Service** – review of medical remuneration model and development of alternative payment strategies
- **Mercy Health and Aged Care Central Queensland** – review of operations and financial management for Mater Rockhampton Hospital
- **Montserrat Day Hospitals** – economic briefing for private haematology and chemotherapy services in Western Australia
- **National Mental Health Commission** – Workplan Assessment Review 2017/18

- **North Metropolitan Health Services** – business case development and financial modelling of state wide services for people living with spinal cord injury
- **North Metropolitan Health Services** – business case development and financial model for new hybrid vascular theatre infrastructure
- **Sideeffect** – development of a strategic operations plan and financial modelling for a new not for profit drug education service
- **Silver Chain (NSW)** – evaluation of Community Palliative Care Services in Western Sydney
- **South Metropolitan Health Service** – Interim Optimization Plan for Fremantle Hospital
- **St John Ambulance (WA)** – feasibility study and review of strategic opportunities for growth and development for a not for profit ambulance service in Western Australia
- **St John Ambulance (WA)** – management of operations and research for the Independent Oversight Panel for a review of health and wellbeing of St John Ambulance employees.
- **Top End Health Service** – review of Top End Medical Retrieval Services (operational review)
- **Top End Health Service/St John Ambulance NT** – review of road ambulance services and integration with aeromedical transfers (Northern Territory)
- **WA Country Health Service Southern Inland Health Initiative** – business case development and financial modelling for the expansion of SIHI programs in rural Western Australia
- **WA Country Health Service** – development of rural cancer service strategy
- **WA Country Health Service** – recurrent costing and procurement analysis for MRI services at Kalgoorlie Health Campus
- **WA Country Health Service** – Operational Cost Modelling for new Karratha Health Campus services
- **WA Country Health Service** – Review of Elective Surgery over boundary patients for Albany Health Campus (processes, management and governance)
- **WA Department of Health** – State Price Review.

Operational, Management and Project Management Experience

In addition, Donelle has extensive operational, management and project management expertise including:

- **Bethesda Hospital** – Manager Corporate Projects - strategic management for corporate and clinical projects including:
 - Strategic services and new market opportunities in health care, aged care and mental health services
 - Review of Clinical Acuity Framework – project management for expansion of hospital services and clinical acuity levels
- **Bethanie Aged Care** – Manager Research and Development responsible for new service growth and development
- **Bethanie Aged Care** – Manager Community Services (North) responsible for operations management of community centres and in-home aged care services covering the regions of North Metropolitan Perth to Geraldton, Western Australia
- **Curtin University** – Manager Curtin Health Innovation Research Institute and Curtin Medical School Project including:
 - Curtin Health Innovation Research Institute – Manager responsible for Institute operations and development, management and monitoring of financial budgets for CHIRI (approximately \$12 million p/a across 17 budget areas)
 - Operational management for Curtin Medical School Proposal project
 - Negotiated funding for research and clinical initiatives with Commonwealth and State Governments (eg, Health Workforce Australia, Royalties for Regions (WA))
- **Curtin University** - strategic project management for educational projects across the University including:
 - Integration of technology for educational delivery – consultancy management
 - Pilot programs in delivery of regional education into the Pilbara – grant development and project management.
- **Ramsay Healthcare** – Director Corporate Services responsible for corporate and operations management for Peel Health Campus (850 + staff) including:
 - Peel Health Campus public private partnership (PPP) hospital services contract management (approximately \$100 million p/a).

CV

Sean Freyne



Discipline

Project Management

Grade

Project Director

Qualifications

Bachelor of Science Degree - Building Surveying

Advanced Diploma of Programme Management (Current Study)

Diploma of Project Management

BTEC HNC Building Studies

BTEC ONC Building Studies

Memberships

MAIPM (Member of the Australian Institute of Project Management)

ICIOB (Incorporated Member of the Chartered Institute of Building).

Regional experience

United Kingdom

Europe

Australia

Capability summary

During a career consisting of 27 years Sean has developed an extensive knowledge of programme and project delivery in construction and commercial real estate development. He has worked in roles for both the client and as a consultant which has enabled him to develop an excellent understanding of the key criteria required by clients in construction management and real estate development across a wide range of sectors including, retail (both big box and shopping mall), aviation, residential, leisure, office, industrial and health.

Sean has provided leadership in delivering Major Projects in International Markets which has enabled him to develop; excellent leadership skills with an ability to develop and manage complex projects and business relationships; establish and manage large project teams; cognitive skills and commercial awareness to ensure project teams continue to work together in the interests of the project; manage major external risks in addition to the main project works including urbanisation and infrastructure works; high levels of contractor negotiation skills; extensive experience in meeting critical deadlines when managing complex projects within dynamic and challenging environments and cultures with multinational project teams.

Sean Freyne

Key technical competencies:

- Project Management Office (PMO) Management
- Programme and Project Management
- Development Management
- Construction Management
- Tendering & Procurement
- Stakeholder Engagement and Management
- Project Risk Management
- Contract & Third Party Negotiations

Highlighted sector experience:

- Infrastructure
- Aviation
- Property
- Commercial
- Residential
- Retail
- Industrial
- Health
- Agriculture

Property

Commercial

AMP Capital, 140 St Georges Terrace, Perth CBD, WA

2016-Present

Value: \$20m

AMPC have packages of work for both Ambient and Technical upgrades. Sean's role as Project Director is to manage the various packages of;

- On Floor Lobbies and Washroom Upgrades.
- Speculative on floor Fit-outs.
- Ground Floor Plane Upgrade.
- Lift Upgrades (14No.).
- BMU Replacement.
- Roof Membrane Replacement.
- Façade Repairs.
- Access Control Upgrade.

Brookfield Property Partners, 108 St Georges Terrace, Perth CBD, WA

2017-Present

Value: Confidential

In the role as Project Director Sean is responsible to deliver the upgrade of the facade spandrel panels to the entire building.

Perth Airport, Echo 2 Office Building, WA

2010-2012

Value: \$22m

In the role as Programme Director for Perth Airport Sean was responsible to deliver this project on time and within budget. With a NLA of 4500sqm over three floors and a basement car park Echo2 is a 5 Star 'Green Star' and 4.5 ABGR (Australian Building Greenhouse Rating) Office Building for Rio Tinto.

Perth Airport, Bravo Office Building, WA

2012-2014

Value: \$44m

In the role as Programme Director for Perth Airport Sean was responsible to deliver this project on time and within budget. With a NLA of 9000sqm and a semi basement car park

Sean Freyne

Bravo is a 5 Star 'Green Star' and 4.5 ABGR Office Building for Byrnescut Mining Group.

Alluvion, Major Office Building, Perth, WA

2007-2008

Value: \$121m

The role of Development Manager covered the responsibility for the development of a major office building located in the heart of the CBD of Perth, Western Australia. This role required Sean to liaise with the joint venture partner, lawyers and financing institutions to ensure compliance with the development and finance agreements.

The project of Alluvion is a Grade 'A' office building comprising of 22 floors located in the CBD of Perth. Alluvion is designed to achieve a 4 Star 'GreenStar' and 4.5 NABERs and includes 36,000sqm of gross floor area, three levels of parking, a cafe, roof terrace and landscape gardens in a three storey foyer lobby. Retail

Infiniti, Car Showroom fitout, WA

2016

Value: \$1.5m

Sean as Project Director is responsible for managing the Brand Compliance for the first WA Infiniti Car Showroom fit-out works at Barbagallo.

Wyatt Grove Shopping Centre, Childcare Facility, WA

2015

Value: \$4m

Sean as Project Director was responsible for the managing the project team to provide Project Management and Superintendent Services for the delivery of a Childcare Facility and 24hr Gym as an expansion of a newly established shopping centre.

Chernigovskaya Retail and Office Complex, Kiev, Ukraine

2008

Value: \$198m

The role of Development Manager required Sean to deliver the above project was a mixed use retail and office complex located on the Brovasky Prospect, Kiev, Ukraine. The complex comprised of two buildings on a land area of 20,000sqm with GLA of 18,500sqm retail, 16,000sqm of office and 8,000sqm of underground parking. The project was managed from the design phase through to tender and contractor award.

Market Central da Vinci Retail Park, Rome, Italy

2005 -2007

Value: \$156

The role of Senior Construction Manager was a national role. The position had the responsibility for managing, with the team, all aspects of the design and construction related activities for the projects undertaken by AIG/Lincoln Italia.

Market Central Da Vinci Retail Park in Rome is a 57,000sqm NLA retail park with over 3000No. Car parking spaces located just 5km from the Rome ring road near to Fiumicino Airport. The Project was awarded The Best Retail Development Project in Italy 2008 at the Italian Real Estate Awards.

Works included in addition to the built form to a green field site a sewage treatment plant including pumping station and lake for irrigation; an electrical sub-station; major road infrastructure to provide access to the main Rome/Fiumicino freeway and road network within the site of which the retail park was 25% of the total development area; due to poor soil conditions throughout the site soil stabilisation was also undertaken.

Sean Freyne

Greene King Pub Partners, UK

2000-2004

Value: various \$2-13m

Sean as Project Director provided leadership on property matters, reporting to the Commercial Director and acting as an influential member of the Commercial Team.

As Senior Project Manager it was Sean's responsibility to plan and implement designated major construction projects across the property development function using the internal and external resources to maximise the return on capital employed on projects.

As Senior Building Surveyor Sean was responsible to line manage a team of five Regional Building Surveyors and three administrators operating the in house help desk. Controlling a budget of \$13M covering an estate of 1,100No. public houses, restaurants and hotels across the south of the UK one third of which are listed buildings.

Scottish & Newcastle Retail, UK

1996-1999

Value: \$3-\$4m per annum

As a Regional Building Surveyor within the Southern Inns Capital Development Team Sean Worked on Public House refurbishments throughout the Southern Inns estate across on London and the south east of England.

Residential

Whitlock Road Housing Development, WA

2015

Value: \$15m

Sean as Project Director was responsible for the managing the project team to provide Project Management support for the Department of Housing during the delivery phase for the new housing development project.

One Brighton, Mandurah, WA

2009-2010

Value: \$85m

Sean was the Development Manager on the high rise luxury apartment building incorporating 52 units and cafe over 13 levels with basement and podium parking. The second element is a low rise Commercial Development over 2 levels consisting of office and retail space. The project also included a land subdivision and road infrastructure upgrades to roads providing access to the adjoining site.

East Thames Housing Group, London, UK

1999-2000

Value: \$6m per annum

Sean performed the function of Senior Building Surveyor with the above registered social landlord based in Stratford, London. The position was responsible for the planned and day-to-day maintenance of approximately 8000No. properties located throughout the east end of London.

Industrial

Europcar Car Rental Support Facility, Perth Airport, WA

2015

Value: \$1.5m

Sean as Project Director was responsible for managing the project team to provide Project Management and Superintendent Services to the Client during the design phase of the D&C Contract of the above project.

Redspot Sixt Car Rental Support Facility, Perth Airport, WA

2015

Value: \$1.5m

Sean as Project Director was responsible for managing the project team to provide Project Management and Superintendent Services to the Client during the design phase of the D&C Contract of the above project.

Sean Freyne

Siemens Service Facility, Perth Airport, WA

2013-2014

Value: \$7m

In the role as Programme Director for Perth Airport Sean was responsible to deliver this project on time and within budget. The Client Specification for the building were challenging and required high levels of Stakeholder engagement and management.

Foodbank Warehouse, Perth Airport, WA

2012-2014

Value: \$15m

In the role as Programme Director for Perth Airport Sean was responsible to oversee the delivery of this project on time and within budget. Perth Airport contributed the Project and Superintendent Services free of charge. This facility is the Foodbank HQ for Western Australia.

Innova Business Park, Milan, Italy

2005-2007

Value: \$353m

Senior Construction Manager

This project was an innovative logistics business park comprising of 265,000sqm of modular units on a 54 hectare site located just northwest of Milan this being at the time the largest logistics business park project for AIG/Lincoln in Europe. The space was created to satisfy the requirements of small, medium and large businesses operating in manufacturing, the service industry and new technology sectors. Works included in addition to the built form to a brown field site were the remediation of the water course and land due to the previous use of site as the Alfa Romeo car manufacturing plant; forming a complex service infrastructure to deliver the site in phases which was dependant on leasing; road infrastructure to provide improved access to and within the site; integration adjoining owners district hot water and heating systems; refurbishment of existing structures.

Fiano Romano Industrial Park, Rome, Italy

2005-2007

Value: \$97m

This project is a logistics park consisting of 120,000sqm of modular logistics buildings situated 40km north of Rome. Works included in addition to the built form to a brown field site were road infrastructure to provide improved access to and within the site.

Healthcare

New Children's Hospital, WA

2016

Value: \$11m

Sean as Project Director is responsible for managing the final phases of delivery of the Pharmacy Robotics and Automated Guided Vehicle FF&E Packages on behalf of the State.

Fiona Stanley Hospital, WA

2016

Value: \$10m

Sean as Project Director is responsible for managing the procurement of the HVAC Services for the Estates Management Team.

Hollywood Private Hospital, WA

2015

Value: \$45m

Director of Project Management

Sean as Project Director was responsible for managing the project team to provide Project Management and Superintendent Services on the above project.

Midland Health Campus, WA

2015

Value: \$370m

Sean as Project Director was the Independent Certifier Representative and responsible for the managing the project team to provide

Sean Freyne

Independent Certifier Services throughout the life of this above project.

Southern Inland Health Initiative, WA

2015

Value: \$110m

Sean as Project Director was responsible for the managing the project team to provide Project Management support for the BMW Project Managers during the design phase of the above project.

Sir Charles Gardiner Hospital, F Block Demolition, WA

2015

Value: \$5m

Sean as Project Director was responsible for the managing the project team to develop the impact assessment and stakeholder engagement on the above project.

Agriculture

Bannister Downs Dairy, New Creamery, WA

2015

Value: \$20m

Sean as Project Director was responsible for the managing the project team to provide Project Management and Superintendent Services for the above project.

Tertiary

Curtin University 10Yr Capital Planning, WA

2017

Value: \$100m per annum

Sean as Project Director was responsible for the managing the project team to provide Project Management advice for the consolidation of the 10 year capital works plan.

Curtin University Infrastructure Programme, WA

2015

Value: \$2m

Sean as Project Director was responsible for the managing the project team to provide Project Management and Superintendent Services for the above project.

Infrastructure: transport

Aviation

Perth Airport, WA

2010-2014

Value: \$170-\$200m per annum

Worked closely with all business units within Perth Airport providing strategic guidance and oversight on the delivery of the Capital Works Programme. This also included the role out and continuous improvement of the Project Management Office for the Capital Works Programme. The Programme comprised of the delivery of office, industrial; terminal and retail expansions and upgrades; significant infrastructure expansion and renewals; security and IT Capital investments. The Capital Works Programme consisted of 55-60No. projects in any time and included the following notable Aviation related projects;

Perth Airport, Perth Airport T1 Consolidation Project, WA

2015

Value: \$20m

Perth Airport, Terminal 3, WA

Dec 2010 - Nov 2014

Value: \$55m

Perth Airport, Terminal 3 Virgin Lounge Expansion, WA

2011

Value: \$2m

Sean Freyne

Perth Airport, T1 Level 2 Departure Lounge Expansion Phase 1, WA

2013-2014

Value: \$10m

Perth Airport, T1 Level 2 Departures Lounge Expansion Phase 2, WA

2014

Value: \$5m

Perth Airport, Domestic Car Park Expansion, WA

2011-2013

Value: \$11m

Perth Airport, HV Network Upgrades, WA

2011-2014

Value: \$19m

Perth Airport, Perimeter Security Solution, WA

2010-2014

Value: \$18m

Perth Airport, Airside /Landside Access Security Gates upgrades, WA

2011-2012

Value: \$5m

Perth Airport, Car Park Equipment Upgrade, WA

2010-2012

Value: \$4m

Perth Airport, Long Term Parking, International Terminal, WA

2010-2014

Value: \$30m

Perth Airport, Emergency Staging Area, WA

2013

Value: \$1m

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Michael Palassis | EXECUTIVE DIRECTOR

B.Com., LL.B., Gr.Dip.App.Fin., M.App.Fin., F Fin.
mpalassis@paxongroup.com.au

Michael is the leader of Paxon's commercial and financial advisory practice and possesses over 20 years' experience.

Michael is an expert in financial and commercial advice for health and aged care projects and has advised on over \$12 billion of health projects over the past 5 years.

Michael provides advice to Paxon clients on:

- Financial modelling and analysis
- Funding and financing of projects and services
- Procurement options assessment
- The development of PPP and collaborative ventures between Government and the Private Sector
- Commercial Strategy and Principles Development
- Business Case development.

Michael's expertise often sees him appointed to expert roles involving health feasibility and planning. Recent expert appointments include:

- Appointed by the NSW Supreme Court to act an independent expert in assessing the damages for a failed private hospital development in Sydney
- Appointed by the NSW Ministry of Health to the expert review panel to derive a new whole-of-State clinical services planning tool.

Educational Qualifications

Michael has obtained the following educational qualifications:

- Bachelor of Commerce - University of Western Australia
- Bachelor of Laws - University of Western Australia
- Graduate Diploma in Applied Finance and Investment – Securities Institute of Australia, and
- Masters of Applied Finance (Major in Infrastructure and Public/Private Financing Initiatives) – Macquarie University.

Aged Care Experience

- **Bethesda Health Care** – developed a bankable feasibility study for a new residential aged care facility
- **Bethesda Health Care** – developed a feasibility study for the deployment of a home care enterprise to leverage existing hospital services
- **Chemo at Home Ltd** – provided financial modelling and commercial advisory services associated with the business development for a new home-based Chemotherapy enterprise
- **Government of NSW** – provided advice on the transaction options for the restructuring / outsourcing / sale of over 3,000 residential aged care beds and associated services in regional NSW

- **Hammond Care** – provided financial advisory services regarding the turnaround of subacute care services
- **Hammond Care** – provided financial modelling services regarding home and community care services
- **Home Hospital Australia** – provided mergers and acquisition advice for the consolidation of home hospital services providers
- **Silver Chain** – provided financial and commercial advisory services regarding new service-level agreements with Government agencies for home care services
- **St Ives** – provided financial and commercial advisory services for the development of a bid to the Western Australian government for sub-acute and home care services in Western Australia
- **St John of God Health Care** – provided strategic and financial advisory services regarding the commercial options surrounding its Australian-wide home care business, Health Choices
- **St John Ambulance** – provided financial modelling and advisory services regarding the development of an Urgent Care and home care service model.

Health Experience

- **Bethesda Health Care** – feasibility study for new hospital service
- **Child and Adolescent Health Service (WA)** - lifestyle costing analysis of alternative procurement methods for medical equipment for the New Children's Hospital
- **Derbarl Yerrigan Health Service** – review of strategic options and review of clinical governance framework and operations for metropolitan wide Aboriginal Medical Services
- **Eastern Health and Monash Health** – financial modelling and feasibility study development to assist establish a centralised medical device sterilisation service across ten hospital sites (2,635 beds) in Melbourne
- **Headwest** – feasibility study and financial modelling for the establishment of a specialist GP practice for patients with disabilities in Western Australia
- **Mater Health Service** – review of medical remuneration model and development of alternative payment strategies
- **Mercy Health and Aged Care Central Queensland** – review of operations and financial management for Mater Rockhampton Hospital
- **Montserrat Day Hospitals** – economic briefing for private haematology and chemotherapy services in Western Australia
- **National Mental Health Commission** – Workplan Assessment Review 2017/18

- **North Metropolitan Health Services** – business case development and financial modelling of state wide services for people living with spinal cord injury
- **North Metropolitan Health Services** – business case development and financial model for new hybrid vascular theatre infrastructure
- **Sideeffect** – development of a strategic operations plan and financial modelling for a new not for profit drug education service
- **Silver Chain (NSW)** – evaluation of Community Palliative Care Services in Western Sydney
- **South Metropolitan Health Service** – Interim Optimization Plan for Fremantle Hospital
- **St John Ambulance (WA)** – feasibility study and review of strategic opportunities for growth and development for a not for profit ambulance service in Western Australia
- **St John Ambulance (WA)** – management of operations and research for the Independent Oversight Panel for a review of health and wellbeing of St John Ambulance employees.
- **Top End Health Service** – review of Top End Medical Retrieval Services (operational review)
- **Top End Health Service/St John Ambulance NT** – review of road ambulance services and integration with aeromedical transfers (Northern Territory)
- **WA Country Health Service Southern Inland Health Initiative** – business case development and financial modelling for the expansion of SIHI programs in rural Western Australia
- **WA Country Health Service** – development of rural cancer service strategy
- **WA Country Health Service** – recurrent costing and procurement analysis for MRI services at Kalgoorlie Health Campus
- **WA Country Health Service** – Operational Cost Modelling for new Karratha Health Campus services
- **WA Country Health Service** – Review of Elective Surgery over boundary patients for Albany Health Campus (processes, management and governance)
- **WA Department of Health** – State Price Review.

Health Financial Analysis Experience

- **Gold Coast Hospital**– advice on facilities management models including in-house cost development, risk assessment, modelling of insource versus outsource options, commercial and contract advice, value for money assessment and preferred option assessment
- **Great Southern Hospitals** – Medical Imaging Services Procurement - Evaluation of tenders for the procurement of medical imaging services at Albany and Katanning Hospitals and x-ray operator sites
- **Independent Expert Advice** –financial assessment of the lifecycle costs associated with asset replacement for the proposed Prince Alfred Private Hospital including creation of a model which looks at lifecycle costs associated with capital replacements of the assets, with no maintenance costs allowed for within the model
- **Mater Health Services Queensland** - high level strategic financial feasibility assessment of the Hyde Park and Pimlico facilities and service delivery options available including a recommendation as to how to proceed with the JCU opportunity
- **Mater Health Services Queensland** - strategic review of Mater Pathology including providing an overview and market assessment of the current pathology market, an assessment of the financial performance of Mater Pathology and financial projections including a detailed three-way financial model and ensuing valuation based on a range of scenarios
- **Midwest Health Initiative** – Geraldton Recurrent Cost Model - financial advisory services for the development of a Business Case for the Midwest Health Initiative
- **Pathwest** - financial evaluation and business case development assistance in relation to a new proposed facility
- **QE11 Mental Health Unit** - business case assistance and related financial analysis for the new state Mental Health Unit located at the QE11 site
- **South West Imaging** - model for costing of imaging services at individual South West Region sites, to inform determination of future operating models for medical imaging at each site
- **WACHS Southern Inland Health Initiative** - business case for increased capital and recurrent funding for the southern inland region of WACHS
- **WA State Government** - business case to the WA State Government for presentation and enhancement of State funding for the Harry Perkins Institute
- **Western Health** - preparation of a detailed infrastructure risk assessment across three sites, including a feasibility study and business case for a proposed first stage of the redevelopment at each site

Santosh De Souza | SENIOR MANAGER

B Com., BE (Mech)

sdesouza@paxongroup.com.au

Santosh is a Senior Manager at Paxon Group. He acts as lead financial analyst providing in-depth financial modelling to support complex and detailed health and infrastructure projects.

Santosh has provided analyst roles across a number of sectors, including healthcare, transport and infrastructure.

He has advised governments and corporations on infrastructure projects and financings, privatisations, corporate strategy and restructuring, debt restructuring, mergers and acquisitions, divestments and business valuations.

Santosh provides advice to Paxon clients on:

- Business case and strategic development
- Corporatisation and Privatisations
- Economic evaluation of investment options and long-term resource management strategies
- Efficiency of cost structures
- Funding and financing
- Financial structures
- Joint venture projects
- Needs and Options Assessment
- Risk modelling.

Educational Qualifications

Santosh has obtained the following educational qualifications:

- Bachelor of Commerce
- Bachelor of Engineering (Mechanical Engineering).

Aged Care Experience

- **Bethesda Health Care** – developed a bankable feasibility study for a new residential aged care facility
- **Bethesda Health Care** – developed a feasibility study for the deployment of a home care enterprise to leverage existing hospital services
- **Chemo at Home Ltd** – provided financial modelling and commercial advisory services associated with the business development for a new home-based Chemotherapy enterprise
- **Government of NSW** – provided advice on the transaction options for the restructuring / outsourcing / sale of over 3,000 residential aged care beds and associated services in regional NSW
- **Hammond Care** – provided financial advisory services regarding the turnaround of subacute care services
- **Hammond Care** – provided financial modelling services regarding home and community care services
- **Home Hospital Australia** – provided mergers and acquisition advice for the consolidation of home hospital services providers

- **North Metropolitan Health Services** – business case development and financial model for Aged Care services at SCGH
- **Silver Chain** – provided financial and commercial advisory services regarding new service-level agreements with Government agencies for home care services
- **St Ives** – provided financial and commercial advisory services for the development of a bid to the Western Australian government for sub-acute and home care services in Western Australia
- **St John of God Health Care** – provided strategic and financial advisory services regarding the commercial options surrounding its Australian-wide home care business, Health Choices
- **St John Ambulance** – provided financial modelling and advisory services regarding the development of an Urgent Care and home care service model.

Health and Health PPP Experience

- **Byron Bay Hospital** – financial adviser to the State of NSW on the examination of colocation options for private hospital development on the hospital site
- **Fiona Stanley Hospital** - commercial and financial adviser for the \$4 billion Facilities Management and MES PPP for the 800 bed Tertiary Fiona Stanley Hospital
- **Geraldton Health Campus** - adviser to St John of God Health Care on an integrated PPP for the Geraldton Health Campus (with the State of Western Australia)
- **Goulburn Hospital** - financial and commercial adviser to NSW Health Infrastructure on the redevelopment of Goulburn Hospital
- **Joondalup Health Campus PPP** – lead financial adviser for the PPP for the \$400 million redevelopment Joondalup Health Campus
- **Lifeshouse Project** – commercial and financial adviser to the State of NSW for the Lifeshouse project including advice on complex financial modelling
- **Mater Private Hospital Springfield** - procurement and financing aspects of the Mater Private Hospital
- **Midland Health Campus** – commercial and financial adviser to St John of God Health Care for its successful bid for the Design, Build and Operate PPP for the \$400 million, 400 bed Midland Health Campus
- **Northern Beaches Hospital PPP** – commercial adviser for the Design, Build, Finance and Operate PPP (including MES) for the 600 bed Northern Beaches Hospital
- **Palmerston Regional Hospital PPP** – commercial and financial adviser to the NT Government for the Palmerston Regional Hospital PPP

Santosh De Souza | SENIOR MANAGER

B Com., BE (Mech)

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- **QEII Medical Centre Car Parking PPP** – financial and commercial advisor to the State of WA for the delivery of 4,500 bay car parking PPP
- **St George Hospital** - cost benefit assessment services for NSW Health Infrastructure's \$600 million hospital redevelopment
- **Sunshine Coast Hospital PPP** – commercial and financial adviser to a bidder for the design, build and maintain PPP of the Sunshine Coast Hospital in Queensland
- **Sutherland Hospital** - cost benefit assessment services for NSW Health Infrastructure's \$600 million hospital redevelopment

General Health Financial Experience

- **Busselton Hospital** - evaluation of potential outsourcing of sub-acute services at Busselton Hospital
- **Busselton Hospital** - business case for redevelopment of Busselton Hospital
- **Carnarvon Health Campus Redevelopment** - business Case for redevelopment of Carnarvon Hospital
- **Comprehensive Cancer Centre** - business case for \$200 million Comprehensive Centre
- **Esperance Health Campus Redevelopment** - business Case for redevelopment of Esperance Hospital
- **Gold Coast Hospital** - lead financial adviser to a bidding consortium who successfully won the right to develop the new Gold Coast Hospital
- **Gold Coast Hospital**– advice on facilities management models including in-house cost development, risk assessment, modelling of insource versus outsource options, commercial and contract advice, value for money assessment and preferred option assessment
- **Great Southern Hospitals** – Medical Imaging Services Procurement - Evaluation of tenders for the procurement of medical imaging services at Albany and Katanning Hospitals and x-ray operator sites
- **Independent Expert Advice** – Macquarie International Health V SLHD - financial assessment of the lifecycle costs associated with asset replacement for the proposed Prince Alfred Private Hospital including creation of a model which looks at lifecycle costs associated with capital replacements of the assets, with no maintenance costs allowed for within the model
- **Mater Health Services Queensland** – development of a proposal to the Queensland Government for the provision of a fully integrated 500 bed public/private hospital
- **Mater Health Services Queensland** - high level strategic financial feasibility assessment of the Hyde Park and Pimlico facilities and service delivery options available including a recommendation as to how to proceed with the JCU opportunity
- **Mater Health Services Queensland** - strategic review of Mater Pathology including providing an overview and market assessment of the current pathology market, an assessment of the financial performance of Mater Pathology and financial projections including a detailed three-way financial model and ensuing valuation based on a range of scenarios
- **Mater Health Services Queensland** - financial advisory services for the planned business developments and a recent call for EOI by James Cook University for a collocated private hospital development on their campus
- **Mercy Health and Aged Care Central Queensland Rockhampton** – engaged to undertake a financial analysis of its Cardiac Catheterisation Laboratory project
- **Midwest Health Initiative** – Geraldton Recurrent Cost Model - financial advisory services for the development of a Business Case for the Midwest Health Initiative
- **NSW Health Infrastructure** - procurement options analysis services for Hornsby Imaging Services
- **NSW Health Infrastructure** – key planning advisory services for the Westmead Hospital Redevelopment
- **Pathwest** - financial evaluation and business case development assistance in relation to a new proposed facility
- **QEII Medical Centre** - development of financial forecasts and net present value analysis for the operations of the Institute, Research and Education Facility to be located on the Queen Elizabeth 11 Medical Centre campus
- **QE11 Mental Health Unit** - business case assistance and related financial analysis for the new state Mental Health Unit located at the QEII site
- **Royal Flying Doctor Service** – business case for the continued funding of interhospital transfers, including the purchase of additional aircraft
- **Royal Flying Doctor Service** – Darwin Patient Transfer Scheme - financial assessment of the proposed agreement between Northern Territory and Western Australia for access to Royal Darwin Hospital by Kimberley patients.
- **South West Imaging** - model for costing of imaging services at individual South West Region sites, to inform determination of future operating models for medical imaging at each site
- **WACHS Southern Inland Health Initiative** - business case for increased capital and recurrent funding for the southern inland region of WACHS
- **WA State Government** - business case to the WA State Government for presentation and enhancement of State funding for the Harry Perkins Institute.