



READ THIS BEFORE EDITING YOUR AFFILIATEWELL™ MATERIALS

Welcome to AffiliateWell™. Today's health care environment is causing many hospitals to consider some form of affiliation that can bring financial strength and resources to help them achieve their mission and vision. Transformations in health care are also requiring greater coordination and integration between hospitals and providers that have typically functioned in parallel silos. It is imperative for the hospital's governing leadership to take a long-term view, and carefully determine the approach that will best ensure the development, continuity and security of the community's health care.

What's Included in AffiliateWell™

In addition to this "Read This Before Using AffiliateWell™" document, AffiliateWell™ includes the following:

- BoardBRIEF – Strategic Affiliation – This BoardBrief provides an overview of considerations the board should make when evaluating the wisdom of an affiliation, including steps in an affiliation assessment process and lists of strategic questions boards should evaluate in their deliberations.
- BoardBRIEF – Trustee's Guide to Organizational Affiliations – This BoardBrief provides an overview of advantages and disadvantages to the various options available to hospitals, such as maintaining independence, operating under a management contract, leasing to or merging with another health care organization and or establishing a strategic affiliation.
- Project Planner – The project planner is an overview and project planning document you should complete when beginning serious consideration of the affiliation process. It outlines three phases of the affiliation process and includes a step-by-step work plan that can be customized to meet your needs and time frames. *The information included in this document provides sample content, and should be reviewed and modified before the rest of the affiliation process is pursued.*
- Overview of Hospital and Market – The Hospital and Market Overview document provides a template for compiling pertinent information about the hospital and its community to be shared with prospective organizations interested in a partnership, merger, management contract or others interested in some form of affiliation. *The information included in this document provides sample content in each area, and should be modified to match each organization's unique needs and goals.*
- Community Survey Form – Gathering community feedback and opinions is a critical component of a hospital's strategic affiliation process. This document includes:

- A sample letter to be sent with the survey
- Suggested survey questions. We recommend selecting the desired questions, and creating an online survey using an online survey tool. You should also distribute hard copies of the survey throughout the community. When the hard copies are returned to your organization, you can manually enter the survey responses into the online survey tool before downloading the data.
- Not all questions need to be included in a community survey. The sample survey includes a wide breadth of questions so that you can select the questions that are most relevant to your organization and community.
- Employee Survey Form - Gathering employee feedback and opinions is a critical component of a hospital's strategic affiliation process. This document includes:
 - A sample letter to be sent with the survey
 - Suggested survey questions. We recommend selecting the desired questions, and creating an online survey using an online survey tool. The link should be sent to all employees.
 - Not all questions need to be included in the employee survey. The sample survey includes a wide breadth of questions so that you can select the questions that are most relevant to your organization and community.
- Leadership Survey Form - Gathering senior leader feedback and opinions is a critical component of a hospital's strategic affiliation process. This document includes:
 - A sample letter to be sent with the survey
 - Suggested survey questions. We recommend selecting the desired questions, and creating an online survey using an online survey tool.
 - Not all questions need to be included in the leadership survey. The sample survey includes a wide breadth of questions so that you can select the questions that are most relevant to your organization and community.
- Community Meeting Materials – Once all surveys have been received and the results reviewed, your hospital may want to hold a community meeting or a community forum. This document includes:
 - A sample community meeting agenda
 - Community meeting logistics
 - Sample questions to explore with participants
 - Meeting roles and responsibilities
 - A sample letter of invitation to invite community members
 - A draft operating principles survey, which can be administrated (anonymously) at the end of the community meeting
- RFP Cover Letter – The sample RFP cover letter is a customizable template designed to solicit interest and proposals from companies the hospital board is most interested in exploring

affiliation opportunities with. It should serve as the cover letter for the RFP. *The information included in this document provides sample content, and should be modified to match each organization's unique needs and goals.*

- **Sample RFP** – The sample RFP provides a customizable template that includes a brief summary of information about the hospital, and the board's actions in determining the organization's interest in affiliation and its objectives. The RFP outlines the proposal process and delineates proposal content and format for submission. *The information included in this document provides sample content, and should be modified to match each organization's unique needs and goals.*
- **Sample RFP Evaluation Form**– The RFP Evaluation Form provides a customizable template that includes a list of more than 35 well-organized criteria by which to evaluate proposals and identify their strengths and advantages, and any potential concerns. *The information included in this document provides sample content, based on the sample RFP included in this toolkit. This evaluation form should be modified to match the criteria requested in the RFP.*

For Additional Assistance

If you have questions or need information, please contact us by calling (630) 613-7580 or by sending an e-mail to barb@governwell.net.

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