

Request For Proposal

# Integrated Facilities Management



**James Schink**  
Consultant

**December 14, 2020**

Re: Proposal for Integrated Facilities Management

Dear Mr. Schink,

It is with confidence and resolve Transwestern submits its proposal for Integrated Facilities Management Services for Kelsey-Seybold Clinic (K-S). We are poised to unleash an unusually powerful focus and intensity on this opportunity specifically designed to generate exceptional project performance and lower operational costs for K-S.

Our experience on large scale projects of this quality dictates that a unique combination of creative and entrepreneurial talent, coupled with innovation and a customized approach, is required to truly generate remarkable results. Transwestern has a proven track record over long periods of time for outstanding performance on projects of this magnitude, and we invite comparison of our firm to our competition in this area. Respectfully, we have the utmost confidence that we can exceed your expectations in the following areas:

- + **Cultural Fit.** We understand and share K-S's culture, values, philosophy and commitment to honor and support them. We have worked alongside you and your founder for years. We are a Houston based, private company and this opportunity is important to us.
- + **Capability.** Our customized team has the proven capability to deliver high-quality real estate services within a healthcare environment, standardized processes and timely reporting of results.
- + **Assurance of Supply.** We have a proven ability to recruit, retain and develop superior team members for our clients in the Houston labor market.
- + **Innovation.** We have the ability to help keep K-S ahead of the competition in the rapidly changing facilities marketplace through leading-edge strategies, technology processes and innovations.
- + **Governance.** Our proposed governance model will work well with the K-S organization structure and management.
- + **Pricing.** We will deliver overall lower costs and market competitive pricing under a performance-based contract.

In short, our plan will:

- + **Align** and **integrate** your facilities and operations
- + Drive for the **lowest cost possible** in your real estate operations
- + Develop and deliver **strategy / innovation / best practices**

We highly value our relationship with K-S, and as such, you are guaranteed to receive our best effort, our best people and our best thinking on each assignment we undertake on your behalf. In addition to our eminently capable service delivery teams, please be assured that Robert Duncan (Chairman), Larry Heard (CEO), Jodie Jiles (Director of Business Development) and the full depth and breadth of our Houston headquartered executive leadership team stand ready to add value to this assignment and this effort. We are all at your disposal and intend to settle for nothing less than complete and total satisfaction from you and the Kelsey-Seybold team.

We are honored to have this opportunity to showcase Transwestern, and we look forward to the opportunity to schedule a follow-up discussion. Until then, please do not hesitate to let us know how we can be of further service.

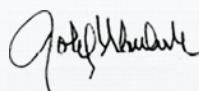
Warmest regards,



**Kevin Roberts**  
President | Southwest



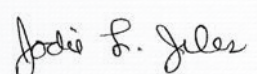
**Stephen Ash CPM®**  
Managing Senior Vice President



**John Wheeler CPM® RPA®**  
Senior Vice President



**Larry Heard**  
Chief Executive Officer



**Jodie Jiles**  
Director of Business  
Development

# Contents

<b>Why Transwestern + Kelsey Seybold?</b> .....	<b>04</b>
+ Company History .....	07
+ Company Philosophy .....	09
+ Overview of Services .....	10
+ Unique Company Strengths (Local Management & Service Operations Team) .....	24
+ Major Customers and Services Provided .....	25
+ Organizational Chart – Designated Account Manager & Service Operations Team Working Relationship .....	27
+ Management Strengths .....	29
+ Personnel qualifications - Account Manager & Operations Manager .....	30
+ Summary of Health Benefits to Employees, including Employer and Employee Contribution Amounts .....	32
<b>Service Contractor Overview</b> .....	<b>33</b>
<b>Ownership Overview</b> .....	<b>35</b>
<b>Organizational Structuring and Typical Clients</b> .....	<b>38</b>
<b>Customer References</b> .....	<b>42</b>
<b>Legal</b> .....	<b>47</b>
<b>Safety &amp; Regulatory</b> .....	<b>49</b>
<b>Background Check</b> .....	<b>51</b>
<b>Customer Relationship Management</b> .....	<b>53</b>
+ Account Management .....	54
+ Customer Service Center .....	63
+ Issue Resolution .....	64
<b>Technical Overview</b> .....	<b>65</b>
<b>Invoicing</b> .....	<b>70</b>
<b>Reporting</b> .....	<b>72</b>
<b>Pricing, Facility List, and Scope of Services</b> .....	<b>74</b>
<b>Facility Management Compensation &amp; Fee Proposal</b> .....	<b>76</b>

The image shows the exterior of the Meisey-Seybold Clinic, a modern multi-story building with a curved facade and large windows. The name "Meisey-Seybold Clinic" is visible on the upper part of the building. A teal graphic overlay is present on the right side of the image, featuring a large white shape that resembles a stylized letter 'S' or a similar abstract form. The overall scene is brightly lit, suggesting a sunny day.

Meisey-Seybold Clinic

# Why Transwestern?

## Commitment to Kelsey-Seybold

Transwestern is proud of our history of service to Kelsey-Seybold through personal and professional services. We are honored to be your partner in your mission of improving the quality + value of healthcare delivered in the community and future growth.



## Our Cultures are Aligned

Our shared commitment to collaboration, innovation and service excellence will result in breakthrough user experiences for Kelsey-Seybold visitors and team members.

## Transwestern Experience

The Transwestern Experience will ensure a gold standard of service delivery and intense attention to detail, thereby enhancing the patient/team member experience, creating value through experience for Kelsey-Seybold.

**Intentional service = enhanced patient satisfaction and memorable user experiences**

## It is Personal

Any company's standards of performance are only as good as the people and the company that make the statements. We are fully aligned and committed to delivering the vast resources and unequalled personal and corporate relationships of Transwestern to the successful management of Kelsey-Seybold Facilities. Our relationship with and our word to Kelsey-Seybold have and will continue to stand the test of time.



## Enhanced Deliverables

We don't believe in a one-size-fits-all solution. Instead, we focus on tailored, customized plans to address the specific market and issues.



Hospitality focus - attention to detail



Cloud based document storage platform

## Ownership Mentality

The Transwestern team works synergistically to create value through a focused best-in-class operational excellence. We call on the full resources of the firm to deliver exceptional results for our clients, and our team is empowered to think and act like owners. In fact, we are "hardwired" with a mentality towards longterm value creation and that mandate governs our daily stewardship of your real estate assets.

## This is Our Home

For a real estate services company, there is something special about its headquarters city. Relationships have existed longer, the root system is deeper, market knowledge is more comprehensive and success stories are greater in number. There is simply no commercial real estate services firm more qualified to do this particular job in this particular city than Transwestern.

Your level of attention to this process focuses the discussion in a manner that highlights the best of Transwestern - our people, our integrity, our expertise and the depth of our commitment.

We are ready to go to work.

## Private Label

The Kelsey-Seybold will continue the evolution of it's iconic brand let's use it - Every uniform, business card, letterhead + email signature will be Kelsey-Seybold branded



# Company History

Transwestern was founded in 1978 as a developer, owner and operator of investment quality real estate in the Southwest. During its more than 40-year history, Transwestern strategically expanded its services, capabilities and geographic reach to provide comprehensive services to owner, occupier and investor clients. Today, Transwestern's more than 2100 team members operate in 34 U.S. cities, and through its strategic alliances with France-based BNP Paribas Real Estate and Canada-based Devencore, the firm serves its occupier clients in an additional 200 cities and 37 countries around the globe.

During the 1990s, capital markets and tenant advisory services were added to Transwestern's traditional strengths in leasing, property management, development services and construction management. Significant expansion in the Midwest, Mid-Atlantic, Southwest and West expanded the firm's geographic reach. Transwestern's initial partnership with the EPA's ENERGY STAR® program in 1999 laid the foundation for its sustainability practice, now recognized by the EPA, USGBC and commercial real estate industry for its innovation and performance. Since 2000, Transwestern has completed a major market expansion with the addition of operations in the Northeast. The firm is currently focused on growing by securing additional market share in its existing cities.

Throughout its dynamic expansion, Transwestern has remained firmly grounded in a culture that empowers team members to provide outstanding results for its clients. Through selective recruiting and targeted acquisitions, Transwestern has added highly capable professionals with a shared vision of creating value for its clients in a team-oriented, relationship-driven environment.

Transwestern is continuously building on its innovative platform to deliver successful results to its clients around the world.

## Game Changing Culture

*Recognized as a "Best Place to Work" across the country, and by fortune as a Great Place to Work for millennials, women, camaraderie and diversity.*



HOUSTON BUSINESS JOURNAL



BEST PLACES TO WORK



## History of Transwestern

**1978**

Founded Transwestern Property Company as a Houston Texas-based commercial development firm

**1980s**

Diversified real estate services by transitioning into third-party management, leasing and investment sales  
Expanded client portfolio in Southwest and West

**1990s**

Added tenant advisory to commercial services platform  
Bolstered Mid-Atlantic presence through merger with regional powerhouse Carey Winston Company and acquisition of research firm, Delta Associates

**Early 2000s**

Grew geographic footprint with offices in Denver, Chicago, San Francisco, Atlanta, Miami and Northeast  
Designed innovative sustainability program in partnership with Energy Star®  
Completed successful mergers in Dallas, Fort Worth and Minneapolis, and acquired Mid-Atlantic developer DRI

**2011**

Created Transwestern Investment Group as an independent real estate investment management firm

**2012**

Extended real estate services capabilities globally through strategic alliance with BNP Paribas Real Estate

**2013**

Established Transwestern Development Company to focus on development of office, industrial, multifamily, mixed-use and healthcare projects

**2015**

Enhanced holistic service model with specialized consulting resources  
Rolled out Transwestern Experience nationwide to reinforce consistent, exceptional service delivery

**2017**

Debuted revolutionary technology platform to achieve greater efficiencies and platform integration  
Honored by Fortune magazine as a Best Workplace for Diversity, Best Workplace for Women, and Best Workplace for Millennials

**2018**

Amplified development capabilities in D.C. metro through affiliation with established developer Perseus  
Strengthened North American presence through strategic alliance with Canada-based Devencore

**2019**

Restructured commercial services into three regions to enrich connectivity and performance

**2020**

During a pandemic, delivering value to clients and building market share through innovative offerings, proprietary technology and consultative real estate solutions



# Company Philosophy



**EMPOWERING  
GOOD PEOPLE...**



**TO DO  
EXTRAORDINARY  
THINGS  
TOGETHER.**

## MISSION

*To consistently excel in delivering value to our clients by empowering our people and fostering an entrepreneurial environment.*

## BRAND PILLARS

Transwestern's brand pillars are the foundation of our company and its success. They support the Transwestern brand.

### VALUES

We have unwavering integrity and steadfast leadership.

### CLIENT EXPERIENCE

We have long-term client relationships and are results-driven.

### THOUGHT LEADERSHIP

We are entrepreneurial, solution-oriented leaders in strategic thinking.

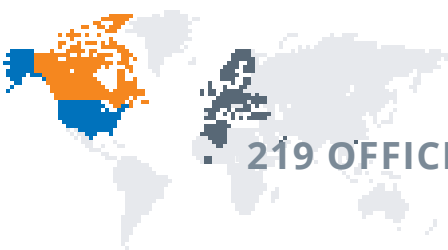
### UNIQUE BUSINESS MODEL

We are local market-centric with customized service based on client needs.

# Overview of Services

Our diversified organization is uniquely positioned to create market and property-specific strategies for our clients. An integrated approach rooted in fresh ideas drives value for clients across commercial real estate services, investment management, development and opportunistic programs for high-net-worth investors.

**GOOD IDEAS PUT INTO PRACTICE. THAT'S THINKING BEYOND THE OBVIOUS.**



**219 OFFICES IN 37 COUNTRIES THROUGH GLOBAL ALLIANCES**



**SELECT CLIENTS**

- AEW
- BARINGS
- BentallGreenOak
- CABOT
- CLARION PARTNERS
- DWS
- Invesco
- KBS
- MEMORIAL HERMANN
- nuveen
- PACIFIC OAK
- Principal
- STOCKBRIDGE
- TRAVELERS
- USAA



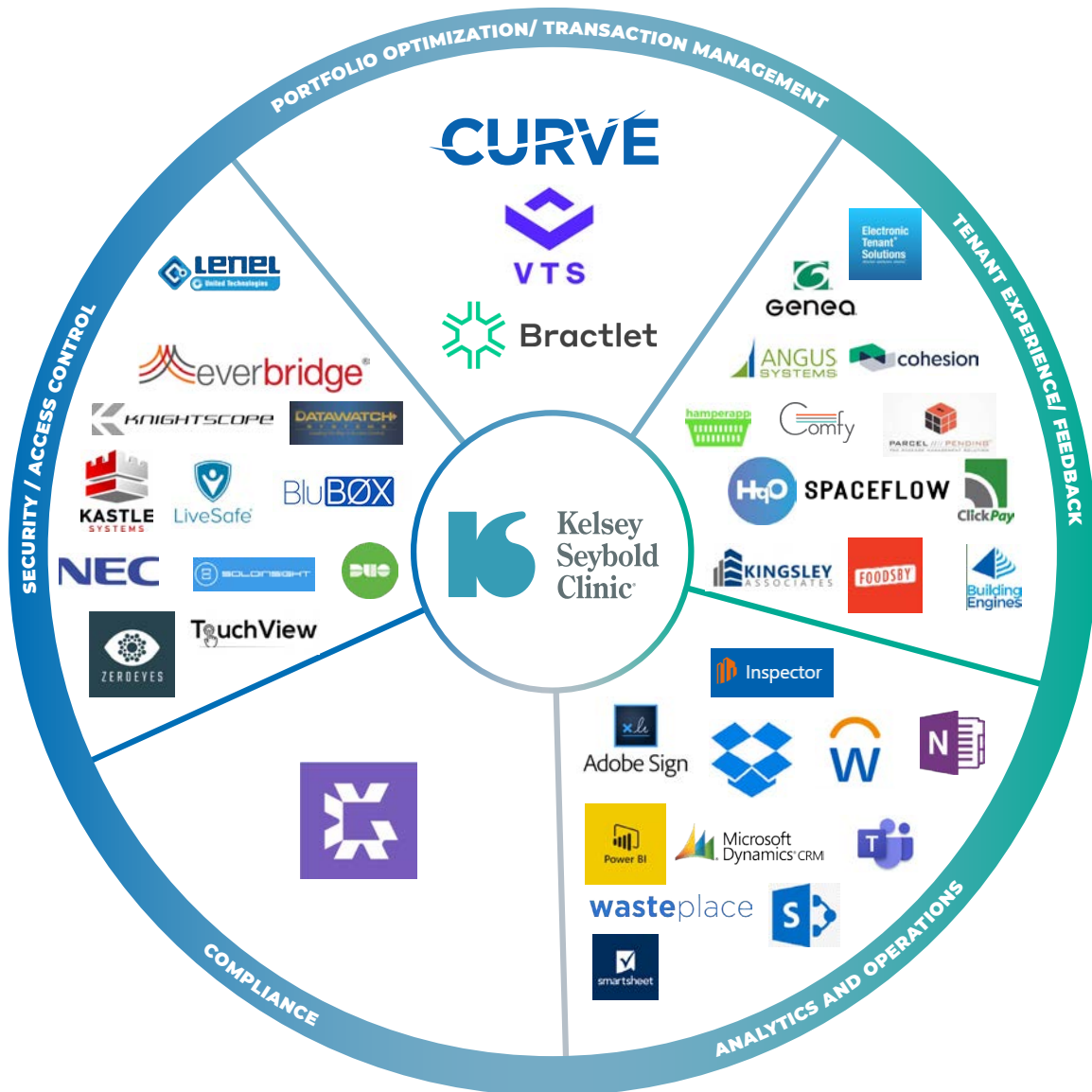


# Technology

## ONE SIZE DOES NOT FIT ALL

We deploy a customized approach that meets your needs - current and future

non proprietary = flexibility



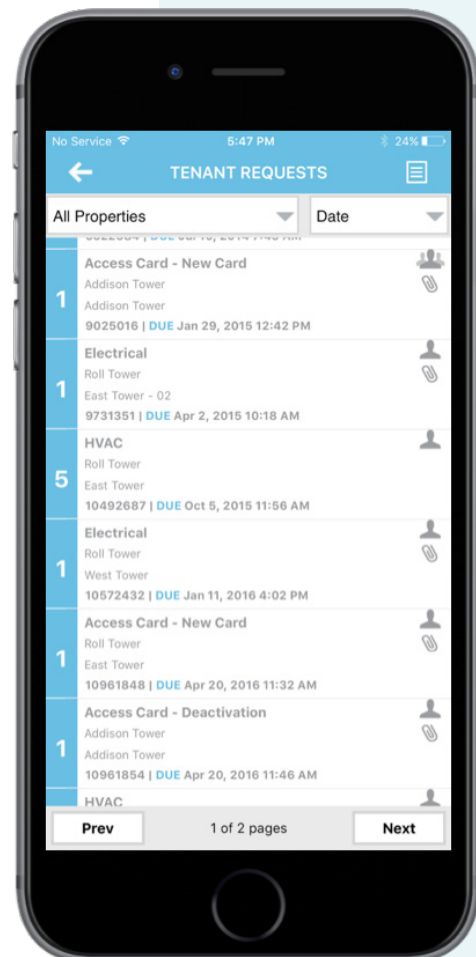
## Work Order/Preventative Maintenance Systems

Transwestern is knowledgeable about a variety of work order systems, and will utilize the best software that is tailored to the needs of our clients. We will operate utilizing EPAC/MPulse as desired by Kelsey Seybold. In addition to using email based work orders, Transwestern also offers an online work order system known as Angus, which give us effective tools to streamline maintenance operations, maximize productivity and reduce costs.

- + Mobile-accessible— user friendly for tenants, employees and clients
- + Simplifies the maintenance process with its automated work orders
- + Preventative maintenance scheduling
- + Asset tracking
- + Instantaneous report generation
- + Inventory control



**This system reduces downtime and significantly lowers costs.**



# Transwestern Inspector Application

Inspect, Monitor and Share Results from any device

## Guardians of asset value.

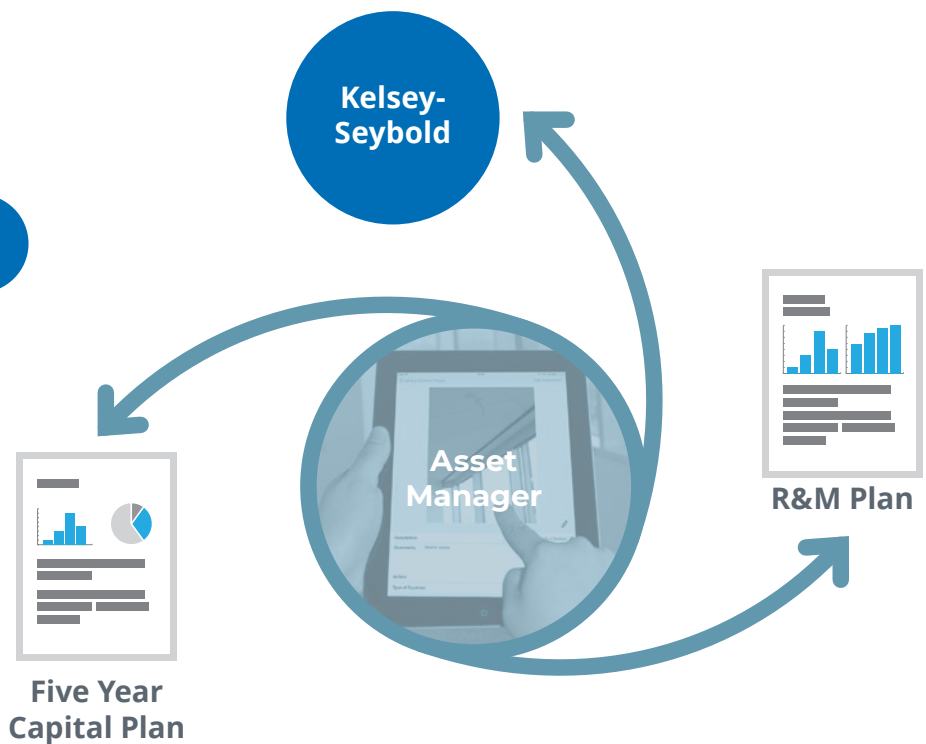
TW Inspector Application allows the project teams to inspect and monitor building components via their iPad, generate action items and reports available to everyone online.

## How do clients benefit from the TW Inspector Application?

- + Assists in asset preservation strategies and capital planning
- + Allows the inspector/engineer to make suggestions for repair and schedule corrective action in a timely and urgent manner
- + No capital expenditure preventative surprises when a building sells
- + Promotes timely maintenance
- + Timely and efficient communication flow

### Absolute Clarity.

Upload the results to Transwestern's property management database, OneSpace®, for your use.



# OneSpace®

OneSpace® is an online application accessible 24/7 that allows teams to collaborate and share files and documentation for all phases of management, engineering and accounting for a property.

**Increase Efficiency:** Asset managers become more productive by utilizing the customized, user-friendly technical solution.

**Simplify Tasks:** OneSpace® stores and shares your property's data in a single, secure and managed environment, so tasks are simplified, organized and completed quickly.



## Document Management system

Single centralized system for storage retrieval



## Property Calendar

Shared calendar to capture and promote property-related events, tasks and deadlines



## Risk Management

Tracking and reminders for vendor and tenant COIs



## Vendor Management

Streamlined onboarding and oversight of all vendors (W-9 upload, OFAC review, vendor contact info)



## Project Management

Timeline, task tracking and delegation for easy project tracking and reporting



## Access From Anywhere

Access from anywhere with an internet connection

## Say goodbye to wasted time.

- + Asset managers, building owners and other third parties can access property documents from anywhere via the internet
- + No cost to the property—the system saves money because records are stored electronically
- + “Google-like” search capability, and improved quality of service and communication on all levels
- + Collaboration across the team (property managers, engineers, accountants and asset managers)





# Compliance Platform

Transwestern's Continuous Compliance Platform provides assurance that key controls are operating effectively at all times, reducing risk while enhancing productivity and efficiency of operations. With proactive SOC 1 reporting, procedures are monitored through a layered control approach involving internal and external audit teams to ensure operational effectiveness and risk management.



## Continuous Monitoring

Audits run against 30+ key performance indicators (KPIs) every day at each property. Every property is monitored daily.

Extracts data from electronic file storage, accounting, engineering software and HR systems.

Using targeted KPI metrics, focuses on the existence of any non-compliant tasks that need attention.



## Soc 1 Compliance Report

Annual SOC 1 audit by E&Y to ensure all internal controls are suitably designed and operating effectively.

Quarterly automated internal audits on systems and user accounts.

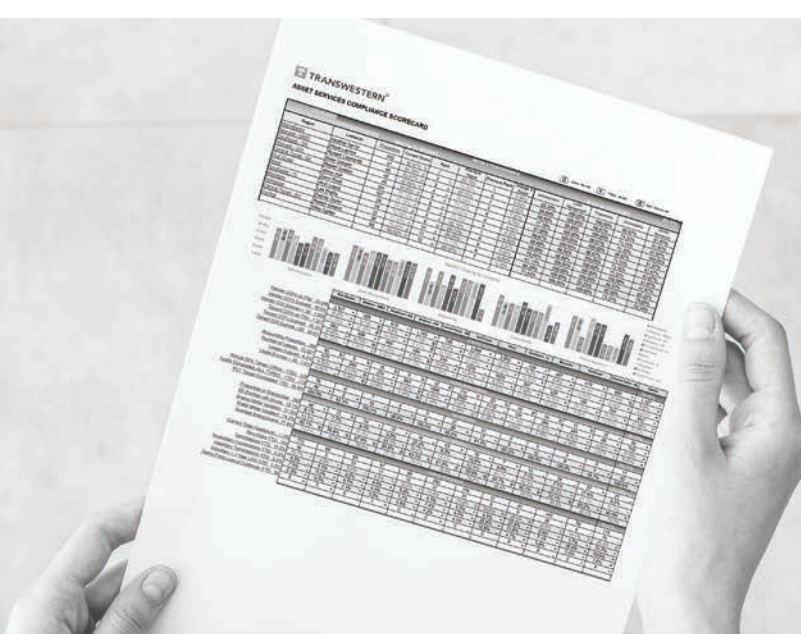
Annual security review of subservice providers to ensure that their controls provide effective support.



## External Field Administration And Engineering Audits

Uses a risk-based approach, coupled with continuous monitoring tools, to focus on areas in need of further review. Our teams use predictive analysis and artificial intelligence to select audit targets with greater inherent risk.

This allows Transwestern to provide similar levels of compliance monitoring regardless of building size or complexity.

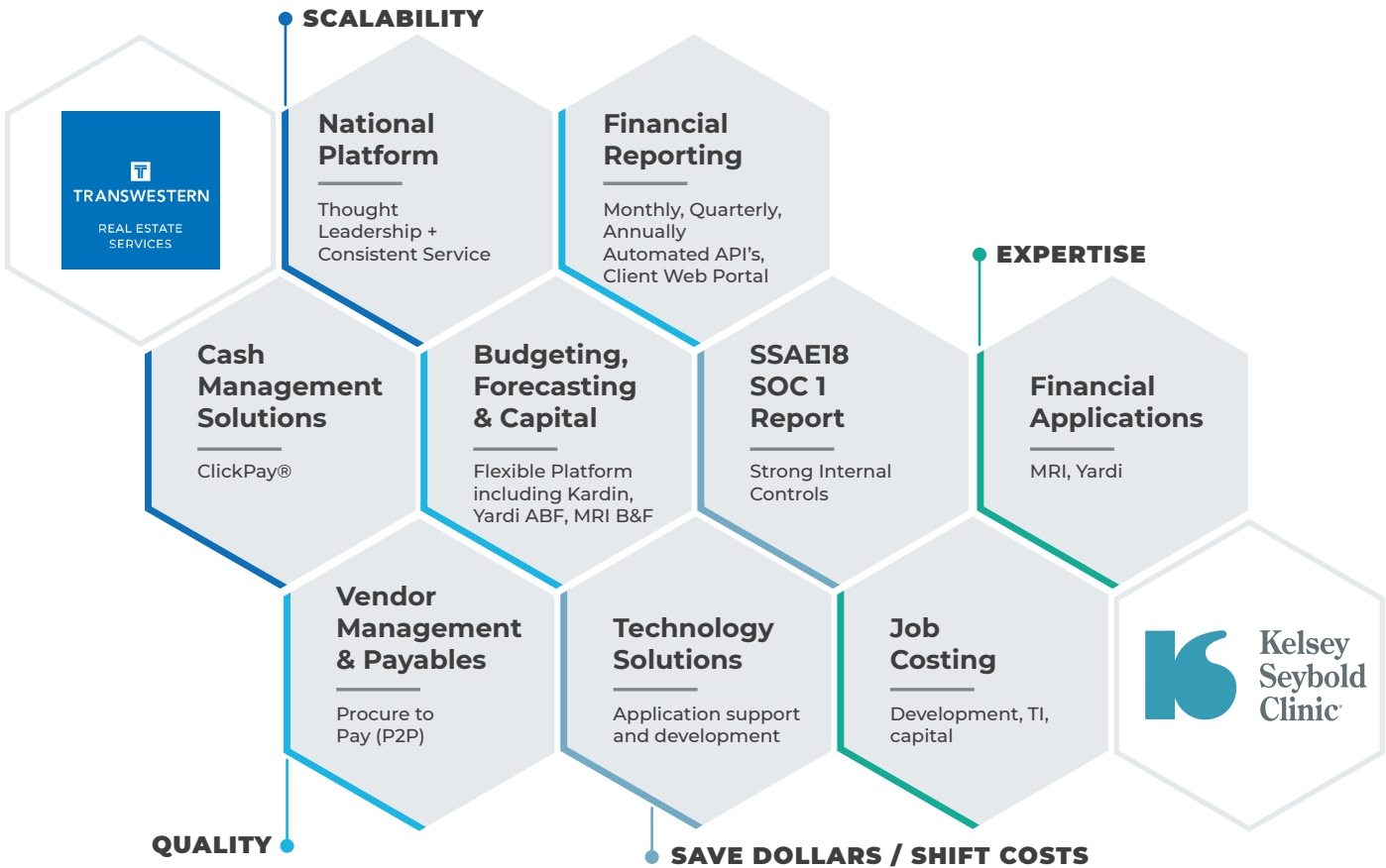


Peace of mind every night.



# Accounting

## Platform - Finance & Accounting



## Create Value

Transwestern's automated cash management system delivers efficiency to every phase of property accounting.

### How do asset managers benefit?

#### Technological solutions to traditionally manual processes

- + Reduce overhead costs associated with tenant invoicing, rent collection and vendor payments
- + Technology frees the property management and client accounting teams to focus on tenant satisfaction and operating efficiencies





# Lease Administration

## Approach

Transwestern approaches lease administration as a creative, collaborative discipline, not simply a tactical function. As such, we bring innovative best practices, documented policies and procedures and industry-leading software technology to every client engagement.

Equally important, our lease administration professionals are integrated with our asset services team.

Upon project takeover, Transwestern property managers, lease administration professionals and project accounting re-abstract every in-place lease to ensure proper data is input into project accounting databases.

Lease terms, critical dates requiring action are input in detail. The information is then triple checked by the team referenced above. All new leases go through the same process

## Key elements of the lease administration process

- + Lease Routing Procedures
- + Lease Summary
- + Security Deposits and First Month Rent Prepayments
- + Commencement Letters
- + Prorated Rent and Abatement Periods
- + Expansions
- + Renewals
- + Sublease Maintenance
- + Surrender Fees and Termination Fees



# Construction Management

## Operational Safety Programs

Transwestern is committed to developing and maintaining safe work environments. Our team members are our most valuable assets and the foundation of our success. Safety is the responsibility of every Transwestern team member. We empower them to provide ideas to promote a safe workplace, all follow basic safety guidelines.

## Construction Management Services

Transwestern has developed comprehensive and clear procedures for managing tenant improvement and capital improvement construction projects, which are included in our construction project development and control program. The program provides specific instructions and tools to guide the entire process.

## Personnel/Staffing/Supervision

The selection of a Project Manager or Senior Level Property Manager is based on project scale and scope. More complex construction projects utilize a project manager. The manager is responsible for overseeing construction, and will:

- + Oversee construction of all tenant improvements
- + Enter into and administer all contracts for each phase of the process
- + Obtain and evaluate bids from prospective general contractors
- + Hire the architect and general contractors
- + Obtain all required documentation: contracts, plans, specifications, permits, approvals, licenses and payments and performance bonds
- + Deliver all required documentation
- + Attend all space-planning meetings
- + Review and approve billing requests
- + Oversee the tenant move-in

### Five Critical Phases

#### **Development**

The development of the scope of work, budget and schedule

#### **Design**

The selection of qualified consultants

#### **Bidding/Negotiating**

Solicitation and selection of contractors

#### **Construction**

Site inspections, testing, progress payments, schedules, lien releases and change orders

#### **Close-Out**

Warranties/guarantees, final payments, final lien releases, surety sign-off requirements, substantial completion and certificates of occupancy



# Sustainability

## Leading Expertise

Transwestern's sustainability experts provide a higher level of service to clients, sharing guidance and putting into place best practices that allow buildings to operate more efficiently and provide greater tenant comfort.



Reduces operating costs and greenhouse gas emissions



Develops high-performance, sustainable buildings



Improves tenant productivity, lowers absenteeism, enhances tenant retention

## Our sustainability experts can assist with any of the following initiatives:

- + ENERGY STAR® benchmarking
- + LEED® certification
- + Energy audits
- + WELL building initiatives
- + LEED® pre-assessment

## We utilize the ENERGY STAR® benchmarking program to reduce property operating costs and greenhouse gas emissions.

298

Office Buildings Benchmarked

149

Buildings Energy Star® Certified

273

Million KBTU Saved

## LEED®

We believe integrating sustainable building and operational measures into standard business practices generates economic, environmental and occupant-related benefits.

Through LEED® certification, Transwestern has achieved substantial results and delivered optimal efficiencies.

*We are committed to ensuring tenants have a workplace that is healthy and environmentally safe.*



95

Leed® Certifications Around The Country



28.5 MSF

Total Building Area



51 M

Gallons Water Saved Total



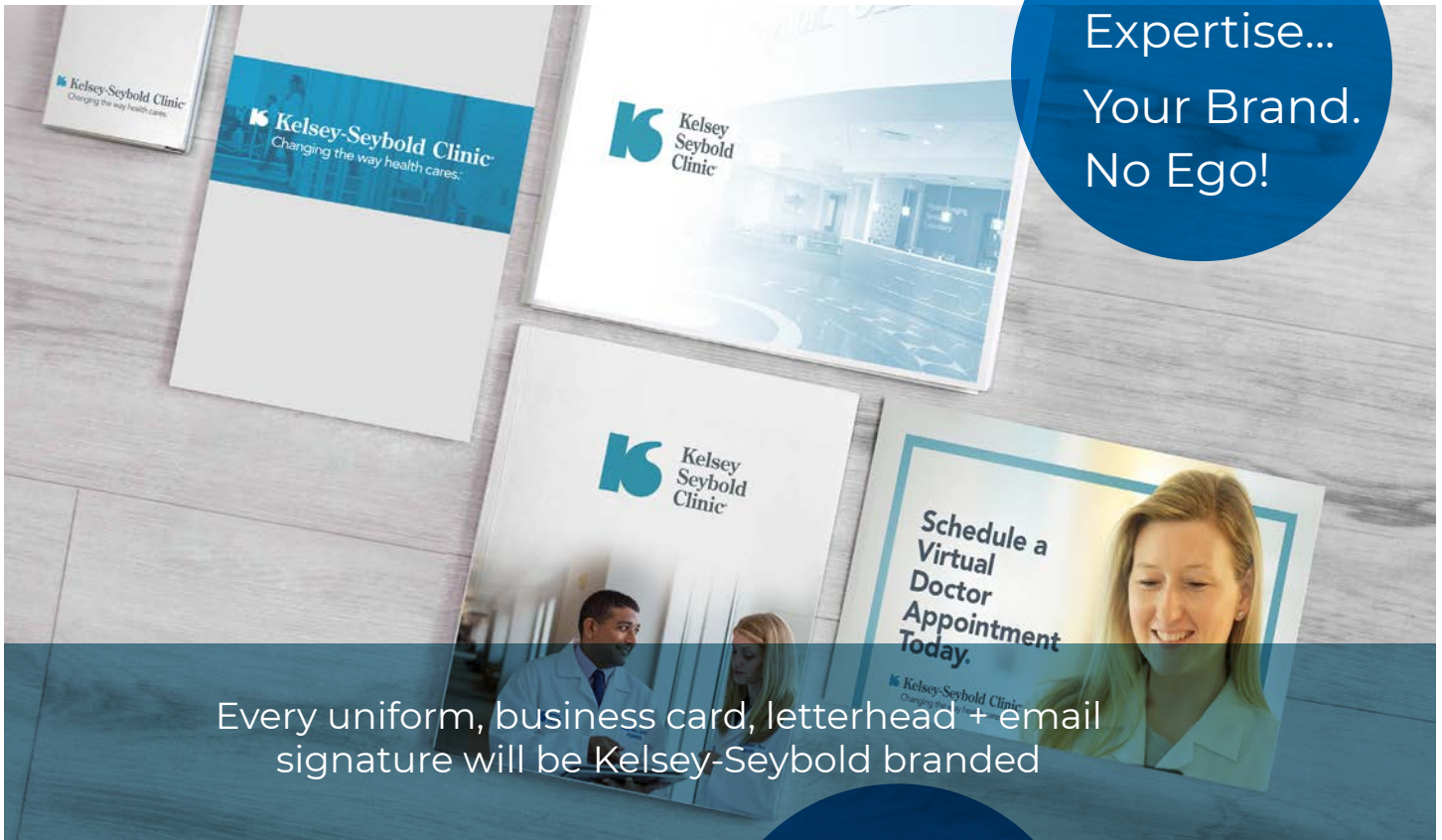
366,221

Tons Recycling Saved Total



# Private Label

Our Expertise...  
Your Brand.  
No Ego!



Every uniform, business card, letterhead + email signature will be Kelsey-Seybold branded



+ you deserve the spotlight

The Kelsey-Seybold brand will continue its evolution into an iconic brand

Let's use it



## In-house property management is great...until it's not.

Vertically integrating property management and related services can add an additional perceived source of revenue, keep your brand in front of tenants and investors and streamline your operations.

But in-house management services are not always as profitable as they seem. Higher overhead costs. Human resources issues. Limited scope of management services. Less agility to respond to fluctuating portfolios and expand into new markets. Maybe it's simply that property management is taking time and money away from your core business of driving returns for investors or clients.

The obvious solution is to outsource property management services. But what if you need to keep an integrated platform, or you only want to outsource portions of your operation? The answer isn't outsourcing.

## What private label management means to you: Your Brand Our Service



### Better Returns

Best-in-class operations combined with award-winning sustainability and energy efficiency programming save money and add value to assets.

### Maximize Time

More time to focus on core real estate business with Transwestern handling portfolio management services.

### Streamlined Reporting

Consistent platform-wide reporting system. Uniform reporting means easier management.

### Flexible, Responsive Management

Self-monitoring of our performance and adaptability when situations change.

### High-Level Advisory Team

More than a team on the ground, the Transwestern executive advisory committee will work with you to provide strategic insight.

### Strategic Approach

Transwestern's strategic advisors, asset managers, business partners and consultants provide value at every level, from operations to corporate strategy.

### Experts In All Disciplines

Access to Transwestern's property management best practices, personnel, technology, construction management and engineering, and accounting tools, resources and knowledge.

### Bench Strength

Expanding operations in a new market or strengthening existing management services? Transwestern we will be there—locally, regionally and nationally.

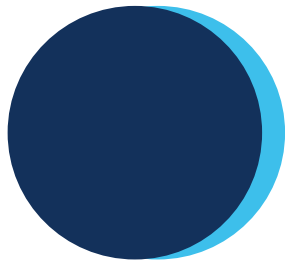
### A Single Point of Contact

Transwestern offers one person to manage every single aspect of the assignment, no matter how broad, or how specific, your needs may be.

### Buying Power

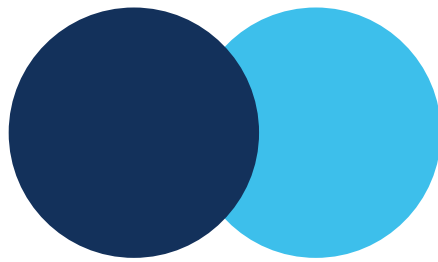
Transwestern leverages national purchasing power across a 362 million-square-foot portfolio, reducing costs on everything from materials to vendor contracts.

## How private label management works:



### Outsource

- + Transwestern can provide all management, accounting, construction management, engineering, sustainability and due diligence services
- + Transwestern provides all applicable staff
- + Transwestern charges a market fee



### Private label

- + Transwestern and the client work to develop a customized approach
- + Transwestern will take on activities for designated areas/segments of the client's portfolio
- + Transwestern will absorb staff in designated areas/segments of the portfolio
- + Transwestern will create a national operating/service program to ensure consistency across the platform



### A la carte

- + Property Management / Facilities Management
- + Project and Construction Management
- + Accounting
- + Engineering
- + Sustainability
- + Due Diligence

## Advantage: Your name, our team

We have the best people in the business, but it's not just about who we are. It's about how we work as a team to achieve results for your properties.



## The Transwestern Experience

All of our property managers are being trained in the Transwestern Experience, which is a completely client-centric approach to property management. We go above and beyond to make sure our tenants are happy, and happy tenants means higher percentage of renewals.

## Team member transition

Our property management team will work with clients to integrate their existing management staff. Frequently the best people are the people who know the property inside and out, and we work with them to combine our best practices with their existing skills and knowledge.

# Competitive Bidding

## CONTRACT BIDDING AND EVALUATION OF EXISTING VENDOR PERFORMANCE

One of Transwestern's critical responsibilities as a client-driven, results-oriented management group is the hiring and supervision of a team of qualified, reliable and cost-effective service providers. Transwestern works with numerous third-party vendors and service providers. It is Transwestern's policy to obtain at least three bids for all service contracts utilizing a well-defined and precise set of specifications and review pricing for all major bids on an annual basis for the duration of the contract.

The firm believes that a competitive bidding process among pre-qualified firms ensures the best pricing and service for owners. Transwestern has developed standardized specifications for services such as janitorial and security to maintain a consistent and high level of performance in all managed properties. Boilerplate service agreements developed by the firm's in-house legal team are utilized as the contracting document unless owner requirements specify their pre-approved forms be employed. Insurance requirements, as individually established by each owner or as defined in Transwestern's policies and procedures documentation, are rigorously checked and enforced.

Transwestern's clout and purchasing power accrued from the size of the firm's management portfolio translates directly into volume savings for clients in the form of lower operating expenses. The firm has no ownership interest in any contract service provider, and as such, can obtain the best competitive prices. Transwestern runs internal comparisons between comparable properties to ensure all projects are receiving the best possible price and performance for janitorial, security and all other contract services. Transwestern has already implemented a number of volume discount programs. First, the company has negotiated several national purchase agreements based upon either a fixed discount or a discount on bid prices based upon Transwestern's purchase volume with the particular vendor. This approach allows Transwestern the opportunity to monitor prices on an ongoing basis for each owner while obtaining a discount on the overall purchase volume of the company as a whole.

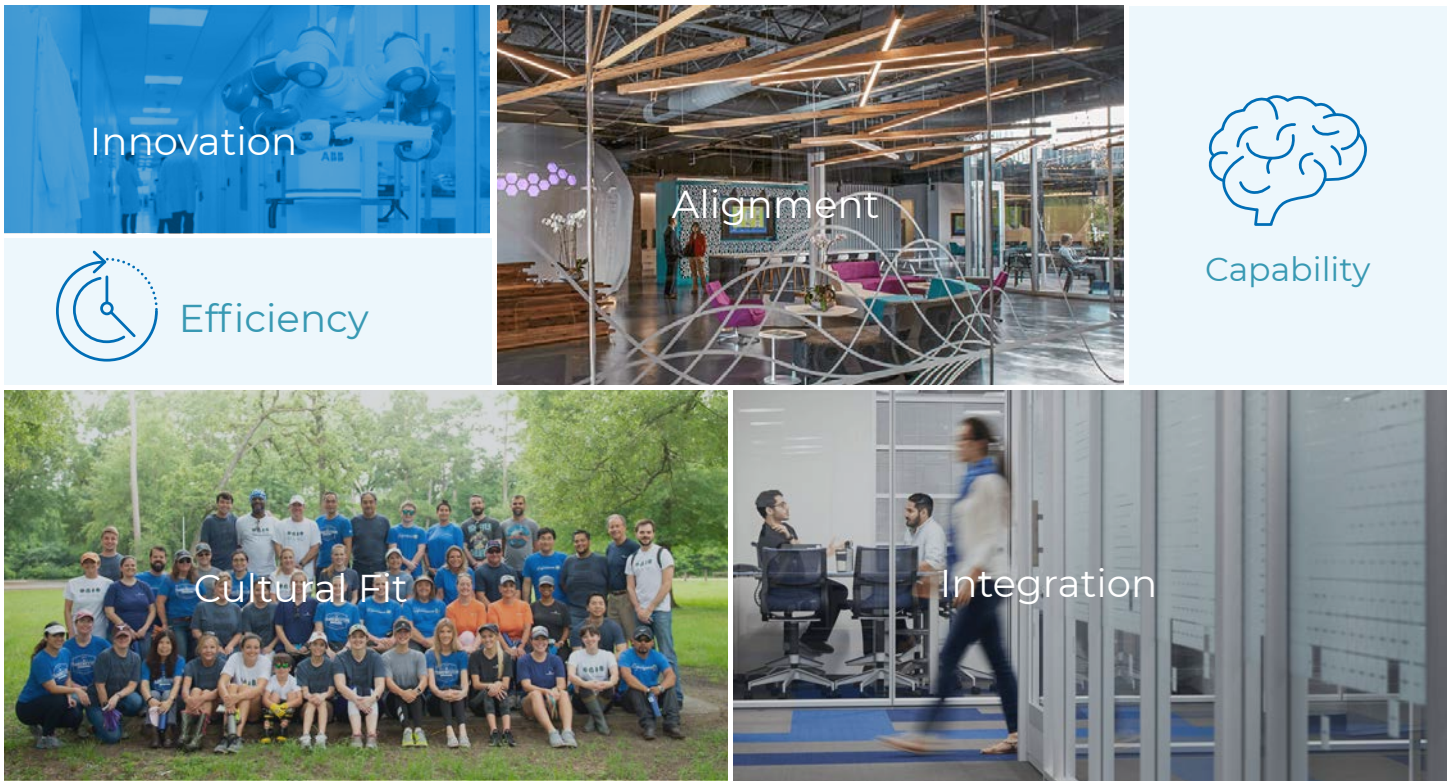
## COMPANIES WITH NATIONAL AGREEMENTS

- + Otis Elevators
- + Schindler
- + Thyssen Krupp
- + Staples
- + Phillips Lighting
- + Georgia Pacific
- + Waste Management
- + Grainger Industrial Supply

Additionally, Transwestern has formed a national agreement with GE Power Buyer as a means of procuring a variety of goods and services. Utilizing Transwestern's national purchasing power of more than 362 million square feet of managed and leased space, the firm routinely realizes consolidated purchasing leverage for clients. By streamlining the procurement process, this relationship helps owners and managers of real estate save time and money, as well as gain enhanced control over their operations.

# Unique Company Strengths (Local Management & Service Operations Team)

## Alignment: Mission + Performance



## What makes us different?

### The Leadership Team

- + Uniquely qualified to serve Kelsey-Seybold
- + Accountable and accessible for the duration
- + Talent hand-selected to meet the need, never settling for the status-quo

### Uniquely Strong in Houston

- + Houston founded, Houston based, Houston led
- + Largest healthcare services team in the state
- + Deep relationships
- + Involved in the community

### Customized Solutions

- + The tailored approach Kelsey-Seybold deserves
- + Adaptive to address and lead healthcare changes

### Hire Us – Get All of Us

- + Shared best practices across our family of companies
- + Real estate management and transaction services
- + Development
- + Capital markets / investment management
- + Hospital real estate consulting, compliance, and accounting
- + All in a private company with no barriers

### Transwestern Houston Management Bench

256+ Asset services team members    40 Property managers    120 Property admins, tenant associate & coordinators    124 Engineers



# Major Customers and Services Provided

**nuveen**

A TIAA Company

**Allianz** 

**Four Oaks Place**

**Houston, TX**

- + Provide Premier Private Label Management Services
- + Integrated Tenant Experience
- + Winner of The Outstanding Building of the Year (TOBY) Award
- + Winner of The BOMA (Houston), Office Building of the Year

**2.3M**  
Square Feet  
office space

**16**  
Years of  
service



**4**  
Years of  
service

**3.5M**  
Square Feet  
office space

  
**MetroNational**

**Memorial City  
Office Towers**

**Houston, TX**

- + Provide Premier Private Label Management Services
- + Integrated Tenant Experience

10

Years of service

MEMORIAL HERMANN

**Memorial Hermann Health System**  
Houston, TX

- + Property Management
- + Construction Management

**Kirk Guilanshah**

System Executive, Real Estate

929 Gessner, 26th Floor

Houston, TX 77024

Kirk.Guilanshah@memorialhermann.org

713.242.2735

**Services Provided**

Transwestern manages a medical office building campus in Memorial City, Memorial Hermann's headquarters, comprised of 6 buildings, totaling 1.7 million sf.

1.7M

Square feet Portfolio Management that includes 2 hospitals and 2 locations

**Sampling of Houston Clients Include**



# Organizational Chart – Designated Account Manager & Service Operations Team Working Relationship



## FACILITIES MANAGEMENT TEAM

**Steve Lammers**  
Director of Facilities

**Nick Ro**  
VP of Facilities



**Tressie Irvin**  
Vice President -  
Asset Services  
Account Manager



**Quentin Schmidt**  
Senior Chief Engineer

NORTH	CENTRAL	SOUTH	WEST
Asst. Chief Engineer	Asst. Chief Engineer	Asst Chief Engineer	Building Engineer
Building Engineer	Engineer, 2nd Grade	Building Engineer	
Building Engineer	Engineer, 2nd Grade	Building Engineer	
Building Engineer	Engineer, 2nd Grade	Building Engineer	
	Engineer, 2nd Grade		
	Building Engineer		
	Building Engineer		
	Journeyman Electrician		

**ASSET SERVICES LEADERSHIP**

**Katie Sakach**  
Managing Director  
- Asset Services

**Brett Williams** CPM®  
Managing Director -  
Business Development

**PROPERTY MANAGEMENT**

**John Wheeler** RPAS CPM®  
Senior Vice President,  
Healthcare Services

**Kelly Wheeler**  
VP/Sr. Property  
Manager

**Myrna Coronado**  
Senior VP

**Sam Chanin**  
Senior VP

**WORKPLACE STRATEGY**

**Heather Nevin**  
Managing  
Senior VP

**ENGINEERING**

**David Stauber**  
Regional Director  
of Engineering

**Jerry Allen**  
Sr. VP -  
Engineering and  
Construction

**Kevin Boltz**  
Director - National  
Engineering

**ASSET SERVICES INNOVATION + TECHNOLOGY TASK FORCE**

**Kelsey-Seybold Clinic®**  
Changing the way health cares.

**Integrated Facilities Management Team**

**Tressie Irvin**  
Vice President - Asset Services  
Account Manager

**Quentin Schmidt**  
Senior Chief Engineer



**SUSTAINABILITY**

**Josh Richards**  
Director

**EXECUTIVE LEADERSHIP**

**Kevin Roberts**  
President -  
Southwest

**Steve Ash** CPM®  
Managing Senior VP  
- Asset Services

**Paul Wittorff**  
Exec Managing  
Director

**Chip Clarke**  
President -  
West Region

**TECHNOLOGY + INNOVATION**

**Jason Moersch**  
Vice President

**Todd Smith**  
Enterprise IT  
Solutions

**Andrew Marcus**  
National Director -  
Enterprise IT Solutions

**Thomas Duncan**  
Business Analyst

**RESEARCH + MARKETING**

**Stuart Showers**  
VP Research

**Gregorio Barrera**  
VP Marketing

**Kim Croley**  
EVP National  
Marketing

**UNPARALLELED ACCESS**

Vendor Leverage, Anchor Tenant Decision Makers, City Leaders & Top Executives

**HIRE US...GET ALL OF US**

**EXECUTIVE LEADERSHIP**



**Robert Duncan**  
Chairman



**Larry Heard**  
CEO



**Tom Lawyer**  
President, TRS



**Steve Harding**  
CFO

**REGIONAL LEADERSHIP**



**Kevin Roberts**  
President,  
Southwest



**Steve Ash** CPM®  
Managing Senior VP -  
Asset Services



**Jodie Jiles**  
Director of Business  
Development

# Management Strengths



## Collaborative entrepreneurs delivering a higher level of personalized service — The Transwestern Experience

Fully integrated global expertise adding value for investors, owners and occupiers of all commercial property types

Recognized as “A Best Place to Work” across the country and by Fortune as a Best Place to Work for Millennials, Women and Camaraderie.

## Deep bench of services experts and team

256+ Asset services team members

124 Engineers

40 Property managers

120 Property admins, tenant associate & coordinators

## Procurement

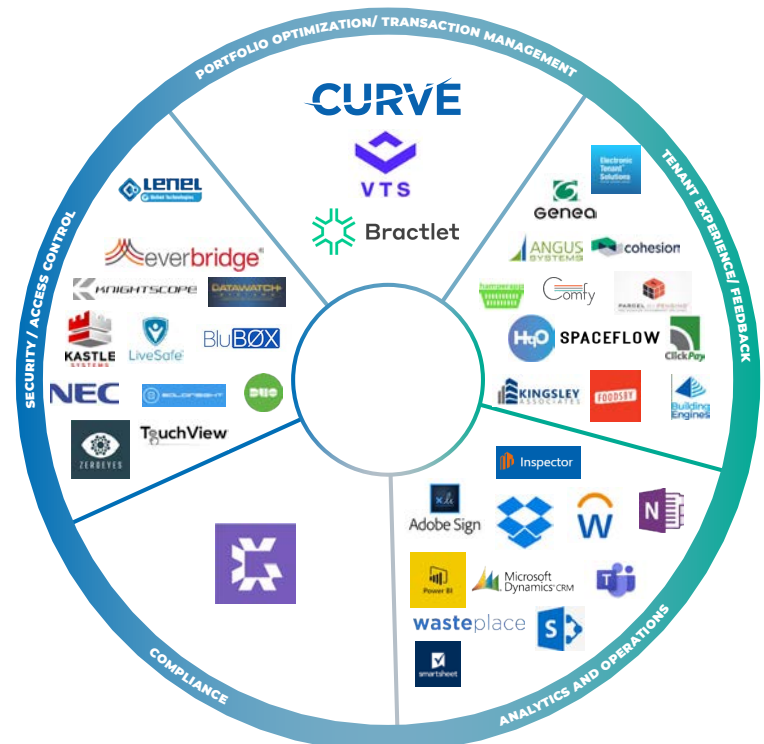
A competitive bidding process among pre-qualified firms ensures the best pricing and service for owners.

- + Three Bids Policy
- + Internal Comparisons
- + Standardized Service Agreements
- + Insurance Requirements
- + Buying Power
- + National Purchase Agreements

## Technology

We deploy a customized approach that meets your needs - current and future

**non proprietary = flexibility**



# Personnel Qualifications - Account Manager & Operations Manager



**Tressie Irvin**

**Vice President - Asset Services**

Tressie will serve as Account Manager and will have direct responsibility for daily interface with the Kelsey Seybold Team in fulfilling the expectations and requirements of this RFP. Tressie has significant experience and proficiency in managing large multilocation portfolios across Houston. She is highly effective utilizing a hands on approach in communicating with clients, vendors and employees and is proficient in monthly reporting and documentation utilizing Transwestern's OneSpace capabilities.



**Quentin Schmit**

**Senior Chief Engineer**

Quentin currently serves as Senior Chief Engineer overseeing 20 medical office buildings totaling approximately 1.1 million square feet in and around Houston. He is responsible for providing support to the respective management teams, supervision of engineering personnel and capital projects. As Senior Chief Engineer for the Kelsey-Seybold portfolio, Quentin will lead the engineering building services. He will report to Tressie Irvin, Account Manager and to Kelsey Seybold.



**John Wheeler** CPM® RPA®

**Senior Vice President**

Property and Facility Services for Transwestern's Gulf Coast region, specializing in healthcare and office property. John will provide oversight and assistance to the Account Manager for Kelsey Seybold including the management of the office buildings and related staff, building systems, parking garages and surface lots, landscape and contracts related to this RFP.



**Jerry Allen**

**Senior Vice President Construction & Engineering**

Jerry will be a valuable resource to the Kelsey Seybold Team with over 30-years experience in executing major capital projects, physical structure and systems due diligence. He will be instrumental in assisting the Transwestern team in setting a baseline of current conditions that will allow the Account Manager and Kelsey Seybold to make informed decisions regarding annual capital projects related to the buildings, garages, surface lots and related drives, as well as plan future capital needs prioritization.



**David Stauber**

**Vice President - Engineering**

David will perform annual Engineering, Condition and Compliance Inspections (ECCI's) as part of Transwestern's commitment to providing the highest quality service to our clients. David will provide direction and support to the onsite Engineering team in transitioning and organizing the operation, record keeping and equipment information/preventative maintenance programs utilized on this portfolio.



## Frank Myers, CHFM, CHSP

**Chief Engineer/Facilities Manager**

Frank currently serves as Chief Engineer over a Hospital Campus totaling approximately 500,000 SF which includes an ambulatory surgery center as well as a sleep center. In addition, he oversees over 12 acres of facility parking and extended property, located on the Memorial Hermann Westside Campus on Westview Drive in Houston. He is responsible for all daily operations and maintenance, supervision of engineering personnel. He shares support role for both Capital Improvement Projects and tenant construction. Frank will serve as healthcare building system strategy support for Kelsey Seybold.



## John Bagwell

**Senior Chief Engineer**

John is currently Chief Engineer of four medical office buildings totaling 800,000 sq. ft. In addition, he oversees over 600,000 sq. ft. of garages and skybridges, located in the Memorial Hermann Hospital Campus on Gessner in Houston. He is responsible for all daily operations and maintenance, supervision of engineering personnel, and major tenant construction projects.

John joined Transwestern in 2007, having over 30 years of commercial and retail operational and maintenance experience, including renovation of existing buildings as well as startup of new buildings. He will serve as healthcare building system strategy support.



## Kevin Boltz

**Director - National Engineering**

Kevin leads Transwestern's engineering team nationally and in 2020 has led COVID building solutions vetting, analysis and recommendations for our clients. Prior to joining Transwestern, Kevin was Manager of Facilities and Engineering with Gates Corporation, where he directed the operations for regional facilities located in Colorado, Texas, Kansas, Washington, and Mexico. Kevin will provide ongoing support with on-going training initiatives geared specifically to the facility and building engineers by partnering with regional leadership.



## Annette Littleton, CHID, RID, IIDA

**Senior Project Manager**

Annette serves as senior project manager for a large Healthcare REIT, managing directly or overseeing a team to handle all interior build outs and an exterior redevelopment throughout their 18 buildings (1.78 million SF). Projects have ranged from small 1,400 SF doctor offices, to 17k SF cancer clinics with Infusion, Linear Accelerator and PET/CT machines, to the exterior painting/window tinting for a 18 floor building. Prior to joining Transwestern, Annette worked directly for architectural firms - designing, documenting, and managing both commercial and healthcare projects. During her previous tenure, Annette completed at least (4) Kelsey Seybold clinics: Sugar Land, Willowbrook, Woodlands, Baytown, as well, as completed several ambulatory surgical centers (last one was Vital Heart & Vein), rehabilitation clinics, hospitals, doctor offices, etc. Annette's expertise can offer construction bench strength to the Kelsey Seybold as required.

# Summary of Health Benefits to Employees, including Employer and Employee Contribution Amounts

## Transwestern 2021 Medical Rates Full Time Employees

2021 Medical rates Full Time Employees									
STANDARD RATES					DISCOUNTED RATES BASED ON COMPLETION OF BIOMETRIC SCREENING & HEALTH RISK ASSESSMENT				
Health Savings Account Plan- Aetna	STANDARD Monthly EE Non-Tobacco	STANDARD Monthly ER Non-Tobacco	STANDARD Monthly EE Tobacco	STANDARD Monthly ER Tobacco	PARTICIPATING Monthly EE Non-Tobacco	PARTICIPATING Monthly ER Non-Tobacco	PARTICIPATING Monthly EE Tobacco	PARTICIPATING Monthly ER Tobacco	Total monthly premium
EE only	\$ 196.00	\$ 487.00	\$ 246.00	\$ 437.00	\$ 121.00	\$ 562.00	\$ 171.00	\$ 512.00	\$ 683.00
EE + spouse/Dom.part	\$ 546.00	\$ 807.00	\$ 646.00	\$ 707.00	\$ 396.00	\$ 957.00	\$ 496.00	\$ 857.00	\$ 1,353.00
EE + children	\$ 391.00	\$ 866.00	\$ 441.00	\$ 816.00	\$ 316.00	\$ 941.00	\$ 366.00	\$ 891.00	\$ 1,257.00
EE+ Family	\$ 832.00	\$ 1,219.00	\$ 932.00	\$ 1,119.00	\$ 682.00	\$ 1,369.00	\$ 782.00	\$ 1,269.00	\$ 2,051.00

Network Provider Plan -Aetna	STANDARD Monthly EE	STANDARD Monthly ER	STANDARD Monthly EE Tobacco	STANDARD Monthly ER Tobacco	PARTICIPATING Monthly EE	PARTICIPATING Monthly ER	PARTICIPATING Monthly EE Tobacco	PARTICIPATING Monthly ER Tobacco	Total monthly premium
EE only	\$ 267.00	\$ 430.00	\$ 317.00	\$ 380.00	\$ 192.00	\$ 505.00	\$ 242.00	\$ 455.00	\$ 697.00
EE + spouse/Dom.part	\$ 707.00	\$ 711.00	\$ 807.00	\$ 611.00	\$ 557.00	\$ 861.00	\$ 657.00	\$ 761.00	\$ 1,418.00
EE + children	\$ 609.00	\$ 722.00	\$ 659.00	\$ 672.00	\$ 534.00	\$ 797.00	\$ 584.00	\$ 747.00	\$ 1,331.00
EE+ Family	\$ 1,052.00	\$ 1,123.00	\$ 1,152.00	\$ 1,023.00	\$ 902.00	\$ 1,273.00	\$ 1,002.00	\$ 1,173.00	\$ 2,175.00

2021 Dental Rates		
Dental High PPO	Monthly EE	Monthly ER
EE only	\$ 55.00	\$ 3.00
EE + spouse/Dom.part	\$ 97.00	\$ 5.00
EE + children	\$ 97.00	\$ 5.00
EE+ Family	\$ 142.00	\$ 8.00

Dental Low PPO	Monthly EE	Monthly ER
EE only	\$ 37.00	\$ 2.00
EE + spouse/Dom.part	\$ 58.00	\$ 3.00
EE + children	\$ 58.00	\$ 3.00
EE+ Family	\$ 86.00	\$ 5.00

2021 Vision Rates		
Option Title	Monthly EE cost	Monthly ER cost
Employee Only	\$ 4.59	\$ -
Employee + Spouse	\$ 9.24	\$ -
Employee + Children	\$ 9.69	\$ -
Employee + Family	\$ 14.15	\$ -

All new hires are automatically enrolled in the lower “participating” premium for the calendar year that their benefits become effective.



*Jelbey*

# Service Contractor Overview



## General Information

### Company Information

The privately held Transwestern companies have been delivering a higher level of personalized service and innovative real estate solutions since 1978. An integrated approach formed from fresh ideas drives value for clients across commercial real estate services, development, investment management and opportunistic programs for high-net-worth investors. The firm operates through 34 U.S. offices and global alliances with BNP Paribas Real Estate and Devencore.

### Legal Company Name

Transwestern Property Company SW GP, L.L.C. d/b/a Transwestern

### Parent Company Name

Transwestern Commercial Services, L.L.C.

### Address

1900 West Loop South, Suite 1300, Houston, TX 77027, United States

### Are visits to your site(s) available by appointment?

Yes

### Contact Information

#### Primary Contact Name:

#### Tressie Irvin, Vice President

Asset Services: Healthcare Advisory Services

Phone: (713) 270-3396

Email: Tressie.Irvin@transwestern.com



Scan QR code with your mobile phone to download v-card

#### Secondary Contact Name:

#### John Wheeler, Senior Vice President

Asset Services: Healthcare Advisory Services

Phone: (713) 242-4282

Email: John.Wheeler@transwestern.com



Scan QR code with your mobile phone to download v-card

#### Senior Management Contact Name:

#### Steve Ash, Managing Senior Vice President

Asset Services

Phone: (713) 270-3365

Email: steve.ash@transwestern.com



Scan QR code with your mobile phone to download v-card

Please provide a copy of your company's W-9

[Click here to download W-9](#)



# Ownership Overview

 Kelsey Pharmacy

Kelsey-Schwartz

FAMILY  
HEALTH

*If public, where does your company trade, and under what stock symbol?*

N/A

*If private, who are the top three principle owners, and what is the related ownership percentage of each?*

Robert Duncan, Chairman and Founder, and the Duncan family trusts own approximately 40%

Larry Heard, CEO owns approximately 7%

David Downey, a former Chicago-based broker owns approximately 5%

*Please give a brief overview of your company including commodities and / or services provided.*

The privately held Transwestern companies have been delivering a higher level of personalized service and innovative real estate solutions since 1978. An integrated approach formed from fresh ideas drives value for clients across commercial real estate services, development, investment management and opportunistic programs for high-net-worth investors. The firm operates through 34 U.S. offices and global alliances with BNP Paribas Real Estate and Devencore.

*What business segments do you service?*

Transwestern Real Estate Services (TRS) adds value for investors, owners and occupiers of all commercial property types through a comprehensive perspective and by providing solutions grounded in sound market intelligence. Part of the Transwestern companies, the firm applies a consultative approach to Agency Leasing, Asset Services, Tenant Advisory + Workplace Solutions, Capital Markets, and Research & Investment Analytics.

*Which year was your company established?*

1978

*What is your state of incorporation?*

Delaware

*What is your web URL?*

www.transwestern.com

*DUNS/DB#*

02-081-8886

*Federal Tax ID#*

36-4232023

*Do you have any local, state, and/or national industry/professional affiliations?*

Yes

*If "yes" please list the industry/professional affiliations.*

Our Company and / or Team Members are part of the following trade associations -

1. International Council of Shopping Centers (ICSC)
2. Building Owners and Managers Association (BOMA)
3. CCIM Institute (CCIM)
4. NAIOP, the Commercial Real Estate Development Association
5. Society of Industrial and Office Realtors (SIOR)
6. National Multi Housing Council (NMHC)
7. US Green Building Council (USGBC)
8. Urban Land Institute (ULI)
9. Commercial Real Estate Women (CREW)
10. CoreNet Global
11. Association for International Real Estate Investors (AFIRE)
12. Institute of Real Estate Management (IREM)
13. Real Estate Round Table
14. Texas Real Estate Commission

*Do you have any local, state, and/or national industry/professional licenses?*

Yes, 125 Sales Agents in Texas, 141 license brokers

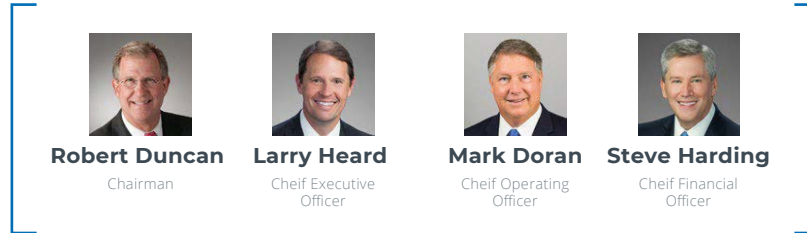
*If "yes" list industry/professional licenses*

1. Certified Commercial Investment Member (CCIM)
2. Certified Property Manager (CPM)
3. Society of Industrial and Office REALTORS® / SIOR
4. LEED Green Associate
5. LEED AP O+M
6. CPA's
7. Real Property Administrator (RPA)
8. City of Houston Stationary Engineers License
9. TDLR Maintenance electrician/ apprentice electrician licenses
10. EPA refrigerant licensing
11. SMT/SMA designations



# **Organizational Structuring and Typical Clients**

Please provide an overview of your company's structuring



**TRANSWESTERN REAL ESTATE SERVICES**



**Tom Lawyer**  
President

**REGIONAL LEADERSHIP**

**FUNCTIONAL LINES**

**OPERATIONAL LEADERSHIP**



**Chip Clarke**  
President  
West



**Kevin Roberts**  
President  
Southwest



**Bruce Ford**  
President  
East



**Katie Sakach**  
Managing Director  
Asset Services



**Tom McNearney**  
Executive Managing  
Director Co-Investment  
Program



**Jeff Moeller**  
Senior Managing  
Director  
Northern California



**Mike Watts**  
President  
Midwest



**Keith Foery**  
Executive Managing  
Director  
Mid-Atlantic



**Brett Williams**  
Managing Director  
Business Development  
Asset Management



**Kim Croley**  
Executive  
VP National  
Marketing & Comm.



**Dave Rock**  
Exec. VP  
Southern  
California



**Paul Wittorf**  
Exec. Managing  
Director  
North Texas



**Patrick Heeg**  
Partner  
New York



**Steve Pumper**  
Executive Managing  
Partner Capital Markets



**Colleen Dolan**  
Executive  
Vice President  
Human Resources



**Phil McCarthy**  
Executive Managing  
Director  
Mid-Atlantic



**Eric Johnson**  
National Director  
Healthcare  
Advisory Services



**Mike McLain**  
Chief Accounting Officer



**Rory Murphy**  
Partner  
New York



**Blake Williams**  
Chief Operating Officer  
Healthcare Advisory  
Services

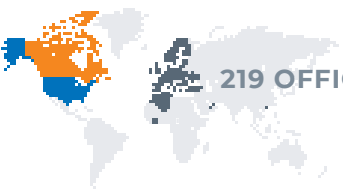
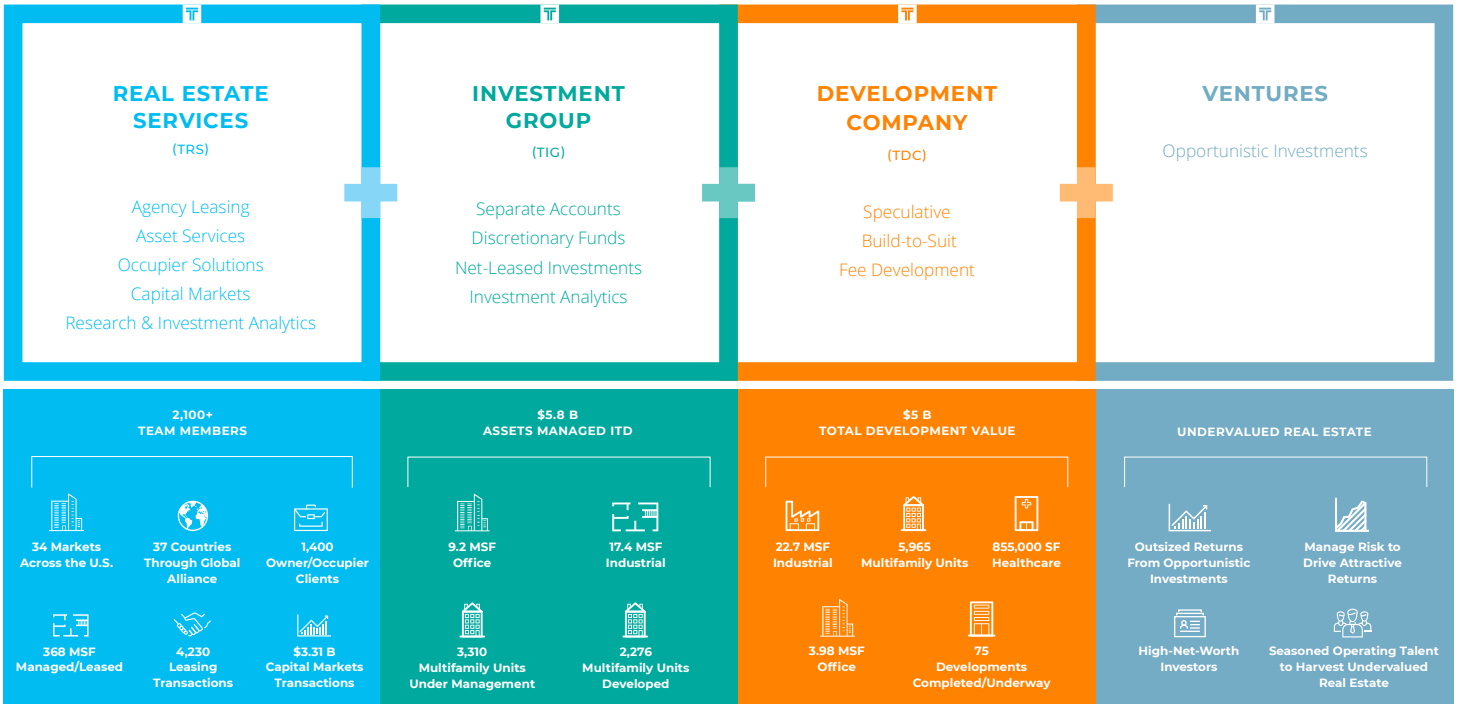


**Jason Moersch**  
Vice President  
Technology Services

Please provide current mix of businesses served for Facilities Management services by industry type (Health Care, Office/Admin, etc.)

Our diversified organization is uniquely positioned to create market and property-specific strategies for our clients. An integrated approach rooted in fresh ideas drives value for clients across commercial real estate services, investment management, development and opportunistic programs for high-net-worth investors.

**GOOD IDEAS PUT INTO PRACTICE. THAT'S THINKING BEYOND THE OBVIOUS.**



219 OFFICES IN 37 COUNTRIES THROUGH GLOBAL ALLIANCES



**SELECT CLIENTS**



Please include an overview of service provided to the Houston market and quantify the amount relating to Healthcare Clients

### Agency Leasing

- + Comprehensive Leasing
- + Marketing Strategies
- + Tenant Prospecting
- + Financial Modeling
- + Lease Negotiation

### Asset Services

- + Property / Facilities Management
- + Accounting
- + Lease Administration
- + Risk Management
- + Sustainability / LEED® & Energy Star®
- + Engineering
- + Construction management

### Capital Markets

- + Investment Services
- + Structured Finance
- + Market Knowledge
- + Property Analysis
- + Financial Modeling
- + Asset Specific Strategies

### Tenant Advisory + Workplace Solutions

- + Transaction Management
- + Lease Administration
- + Project Management
- + Consulting Services

### Research

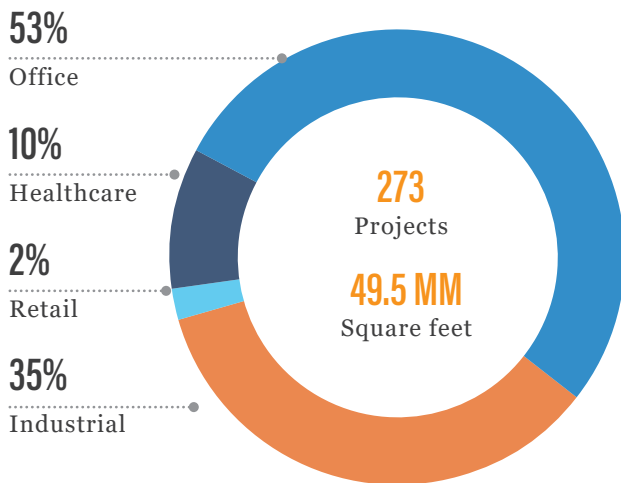
- + Robust In-House Regional Research Teams
- + Data Analysis For All Property Types
- + Penetrating Market Trends For Benefit Of Owner And Occupier Clients
- + Delta Associates, Transwestern's Research Consulting Affiliate

### Marketing

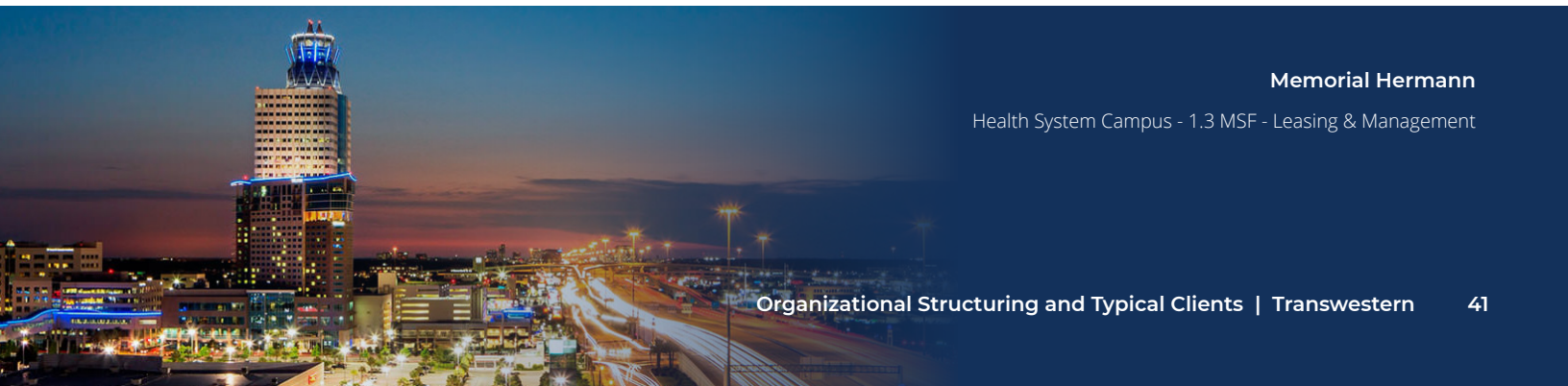
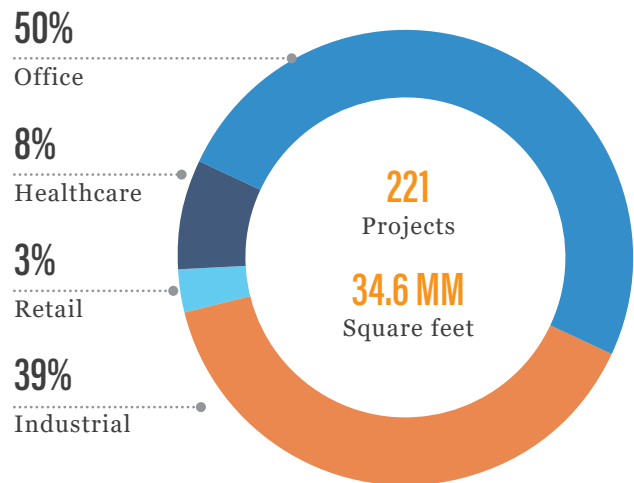
- + In-House and always custom marketing/branding service
- + PR / Media
- + Strategic targeted marketing campaigns for online/mobile and print
- + State-of-the-art technology + 3D Virtual tours

## Houston Portfolio

### Agency (Landlord) Leasing Services



### Asset Services



Memorial Hermann

Health System Campus - 1.3 MSF - Leasing & Management



# Customer Reference

Please provide 4 customer references, 2 current and 2 previous customers. Please include POC names/contact information, type of Facility (MOB, Hospital, etc.), cleanable sq-ft, overall service satisfaction, expense reduction, and other relevant key performance indicators.

## Current references

### Jason E. Trippier, MA

Director, UHS Properties

Office of Real Estate Services

University of Houston System

832-842-8810

### UH TECHNOLOGY BRIDGE

Houston, TX

- + Transformed an aging campus into academic/research classroom facilities and a dynamic business park setting
- + Developed customized proprietary budget matrix
- + Provided construction management expertise to cost effectively convert distribution space into classrooms and laboratories
- + Transwestern oversees the UH investment in building renovations in excess of \$3M



9  
Years of  
service

692K  
Square feet  
research park - 74  
acre campus



### Scooter Hicks | CIO

MetroNational

945 Bunker Hill, Suite 400

Houston, Texas 77024

713.586.6256 o | 832.605.3365 c

### Memorial City Office Towers

Houston, TX

- + Provide Premier Private Label Management Services
- + Integrated Tenant Experience
- + 3.5M Square Feet office space

## Previous references



### **Ben Llana**

Director - Development  
Skanska  
800 Capitol St. Suite 1210  
Houston, TX  
713-213-3887 mobile  
benjamin.llana@skanska.com

### **Services Provided**

Property Management, 780,341 SF  
Development through sale, and retained with buyer



### **Courtney Nelson (fka Hanfland)**

System Director, Real Estate Transactions & Portfolio Strategy | National Real Estate Services

CommonSpirit (Formally CHI St. Lukes)  
198 Inverness Drive West, Englewood, CO  
courtneynelson@catholichealth.net  
303-518-4676

### **Services Provided**

Transwestern managed the O-Quinn Medical Tower & the 6620 Main project in the Texas Medical Center for St. Luke's, predecessor to CHI St. Luke's, 2-Building 570k SF and garages.

Has your company provided product or services to CLIENT or its affiliates in the past 5 years? If previously, when?

If yes, what companies, locations, and dates.

## Medical Office Building With Clinical Space

### Kelsey-Seybold Clinic

Project:	Kelsey-Seybold Clinic
Transwestern Role:	Owner & Development Manager
Project Scope:	Medical Office Building
Client:	Kelsey-Seybold Clinic
Architect:	Kirksey Architecture
GC:	EE Reed
Size:	79,700 Square Feet
Cost:	\$13.5 Million
Completion Date:	12/2005
Construction Delivery Method:	GMAX
Scope:	Medical Offices for Kelsey-Seybold Clinic, a multi-specialty provider in the Houston, Texas. The building is patterned after Kelsey-Seybold's main campus facility in the Texas Medical Center and includes three stories of medical office and diagnostic services.



*CLIENT shall have the right to audit supplier, providing reasonable prior notice, to inspect pertinent records to confirm compliance with its agreed obligations at time of business award. Do you agree to allow CLIENT to inspect those records?*

Transwestern agrees to cooperate with Kelsey Seybold in verifying that Transwestern is in compliance with agreed to obligations for facility management award. We will provide information as we are able, some of which may need to be under confidentiality as Transwestern is a private company.

*Has any of your contracts to provide Integrated Facilities Management services been terminated by the owner within the last 5 years? If so, give owner and details.*

Transwestern has not had any facility management assignments terminated in past five years for cause. The projects we have had termed are typically due to sale. No projects have been termed due to performance or client dissatisfaction.

Transwestern Houston maintains a services renewal rate in excess of 95% annually on a 40 million sf portfolio in Houston, TX.

*Please provide a summary of your health benefits, including the employer and employee contribution amounts.*

2021 Medical rates Full Time Employees									
STANDARD RATES					DISCOUNTED RATES BASED ON COMPLETION OF BIOMETRIC SCREENING & HEALTH RISK ASSESSMENT				
Health Savings Account Plan- Aetna	STANDARD Monthly EE Non-Tobacco	STANDARD Monthly ER Non-Tobacco	STANDARD Monthly EE Tobacco	STANDARD Monthly ER Tobacco	PARTICIPATING Monthly EE Non-Tobacco	PARTICIPATING Monthly ER Non-Tobacco	PARTICIPATING Monthly EE Tobacco	PARTICIPATING Monthly ER Tobacco	Total monthly premium
EE only	\$ 196.00	\$ 487.00	\$ 246.00	\$ 437.00	\$ 121.00	\$ 562.00	\$ 171.00	\$ 512.00	\$ 683.00
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Network Provider Plan -Aetna	STANDARD Monthly EE	STANDARD Monthly ER	STANDARD Monthly EE Tobacco	STANDARD Monthly ER Tobacco	PARTICIPATING Monthly EE	PARTICIPATING Monthly ER	PARTICIPATING Monthly EE Tobacco	PARTICIPATING Monthly ER Tobacco	Total monthly premium
EE only	\$ 267.00	\$ 430.00	\$ 317.00	\$ 380.00	\$ 192.00	\$ 505.00	\$ 242.00	\$ 455.00	\$ 697.00
EE + spouse/Dom.part	\$ 707.00	\$ 711.00	\$ 807.00	\$ 611.00	\$ 557.00	\$ 861.00	\$ 657.00	\$ 761.00	\$ 1,418.00
EE + children	\$ 609.00	\$ 722.00	\$ 659.00	\$ 672.00	\$ 534.00	\$ 797.00	\$ 584.00	\$ 747.00	\$ 1,331.00
EE+ Family	\$ 1,052.00	\$ 1,123.00	\$ 1,152.00	\$ 1,023.00	\$ 902.00	\$ 1,273.00	\$ 1,002.00	\$ 1,173.00	\$ 2,175.00

2021 Dental Rates		
Dental High PPO	Monthly EE	Monthly ER
EE only	\$ 55.00	\$ 3.00
EE + spouse/Dom.part	\$ 97.00	\$ 5.00
EE + children	\$ 97.00	\$ 5.00
EE+ Family	\$ 142.00	\$ 8.00

Dental Low PPO	Monthly EE	Monthly ER
EE only	\$ 37.00	\$ 2.00
EE + spouse/Dom.part	\$ 58.00	\$ 3.00
EE + children	\$ 58.00	\$ 3.00
EE+ Family	\$ 86.00	\$ 5.00

2021 Vision Rates		
Option Title	Monthly EE cost	Monthly ER cost
Employee Only	\$ 4.59	\$ -
Employee + Spouse	\$ 9.24	\$ -
Employee + Children	\$ 9.69	\$ -
Employee + Family	\$ 14.15	\$ -

All new hires are automatically enrolled in the lower “participating” premium for the calendar year that their benefits become effective.

*Please confirm if you are a current Kelsey Seybold customer or in negotiations with Kelsey Care Advantage.*

Transwestern is not currently a Kelsey Care Advantage customer, but it has been included in benefit programs reviewed by Transwestern’s benefits group.

Many of team members have been patient customers of Kelsey Seybold for a variety of services for many years, some dating back to the 1970s!



Kelsey Seybold Clinic

# Legal

*Have you ever operated a Integrated Facilities Management service provider under a different name? If yes, give name and details.*

No

*Has your company ever filed bankruptcy?*

*If "Yes", when?*

No

*Is your company currently contemplating mergers or acquisitions?*

No

*Have you been in litigation relating to your performance on a contract during the past 5 years? If yes, explain, and provide case name and number. Are you currently going through any litigation that may impact services?*

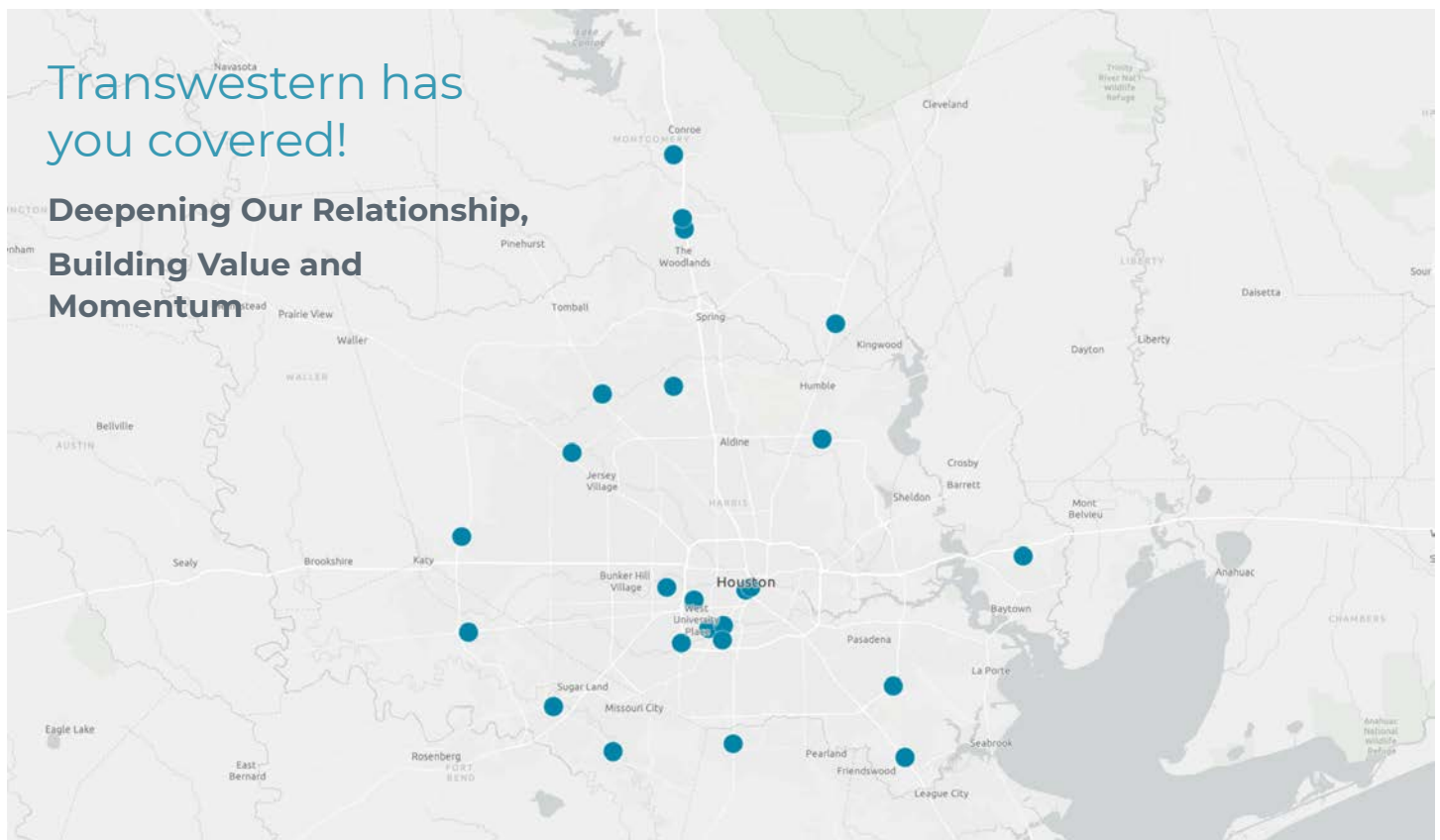
Transwestern is occasionally involved in the types of routine litigation common to national multi-disciplinary real estate service providers, the majority of which are covered by insurance or indemnification by property owners. Transwestern is not a party to any criminal proceedings or involved in any litigation that could affect our ability to provide the highest level of service.

*What Geographic Locations do you service?*

*The following is a list of CLIENT locations. Please check all those locations you can service.*

Transwestern is headquartered in Houston, TX and Services all areas within the Greater Houston Area, including Conroe, the Woodlands, Kingwood, Spring, Katy, Pearland, Clear lake and Sugar land.

Transwestern serves 34 major market areas within the U.S.







# **Safety & Regulatory**

*Do you have a formal/written safety program? If yes, please attach.*

Ensuring a comfortable, safe, and productive work environment is an important role of the Transwestern team, and all policies are closely monitored to ensure optimal execution.

The Transwestern team values education, and collectively maintains many notable industry certifications as a result. All members of the building staff complete mandatory and routine training sessions such as NFPA 70e (arc Flash) and OSHA to ensure a safe working environment for both the team and our valued clients.

*Do you have a contingency plan or disaster recovery plan in the event of a disaster? If so, please provide a copy of the plan.*

[Click here to download disaster recovery plan](#)



# Background Check

*BACKGROUND CHECK: Service Contractor shall be responsible for conducting background checks on all workers deployed to perform services for CLIENT and for certifying to CLIENT that employees whose background checks reveal/indicate the following convictions shall not be assigned to CLIENT or any of its affiliates or subsidiaries: felony conviction, any conviction resulting in time spent in jail, more than one misdemeanor of any kind (excluding traffic violations), any sex offense, offense involving a weapon, offense involving violating a crime against a previous employer, or any crime involving fraud, theft, etc. I have read and understand this requirement.*

In order to hire the most qualified applicants and maintain the safety and security of our workplace and operations, Transwestern requires background checks on all applicants who have received a conditional job offer. Transwestern also will require existing employees to submit to background checks in some circumstances (for example, certain transfers or promotions).

Cooperation in the background check process is mandatory. Any individual who provides Transwestern with false or misleading information in connection a background check will not be eligible for hire or continued employment. Transwestern relies upon the accuracy of information contained in the employment application as well as the accuracy of other data presented throughout the hiring process and employment, including any oral interviews. Any misrepresentations, falsifications, or material omissions in any of the information or data, no matter when discovered, may result in the Transwestern's exclusion of the individual from further consideration for employment or, if the person has been hired, termination of employment.

All screenings are conducted in strict conformity with the federal Fair Credit Reporting Act (FCRA), and state and federal anti-discrimination and privacy laws. All background checks are done only after an applicant or an employee has received certain disclosures and has signed an authorization allowing Transwestern to perform the background check. Information in a background check report (including but not limited to criminal records [and credit history information]), will be considered to determine whether the applicant is suitable for the position for which he or she is applying, as allowed by applicable law. The determination will be made by the hiring manager in conjunction with the Region HR Business Partner and client, where required. Transwestern is an equal opportunity employer and will comply with applicable federal, state and local laws relating to the use of background checks for employment purposes.





# **Customer Relationship Management**

# Account Management

*Describe your new client account set-up process. Specifically, please provide a timeline for transition of services from date of formal contract award/execution – this should include key project checkpoints and roles/responsibilities (internally and from Kelsey Seybold) for successful transition*

We have extensive experience in transitioning large accounts. It starts with a Strategic Plan and Executive Sponsorship as shown in the graphic below. The Strategic, Integration and Implementation Teams from both our organizations must meet early and often to establish the strategy, plan, timing, KPI's, communication expectations and how will we measure success during the three phase of the plan – i) Pre-transition, ii) At transition and iii) Post transition.

## TRANSITION PLAN 3/1/2021 ESTIMATED GO LIVE

ID	TASK NAME	RESOURCE NAME	Q1 2021		
			JAN	FEB	MAR
1	Establish Strategy & Exceptions	KS / ST-INT			
2	Engagement terms	KS / ST			
3	Account Management & Strategic Plan	KS / ST			
4	Draft & Gain Consensus on Operational Plan	KS / OPER-INT-IMP			
5	Facilities & Property Management Plans	KS / OPER-INT-IMP			
6	Personnel/Human Resources Plan	KS / PER-OPER-INT			
7	Technology Plan	KS / IT-OPER-ACCT			
8	Lease Administration Plan	KS / IT-OPER-ACCT			
9	Project Management Plan	KS / PRJM-OPER-ACCT			
10	Accounting & Reporting Plan	KS / ACCT-OPER			
11	Communication Plan	KS / ACCT-OPER			
12	Complete Transition	KS / OPER			

**Resource Names:**

**Transwestern Teams:**

**KS** = Kelsey-Seybold

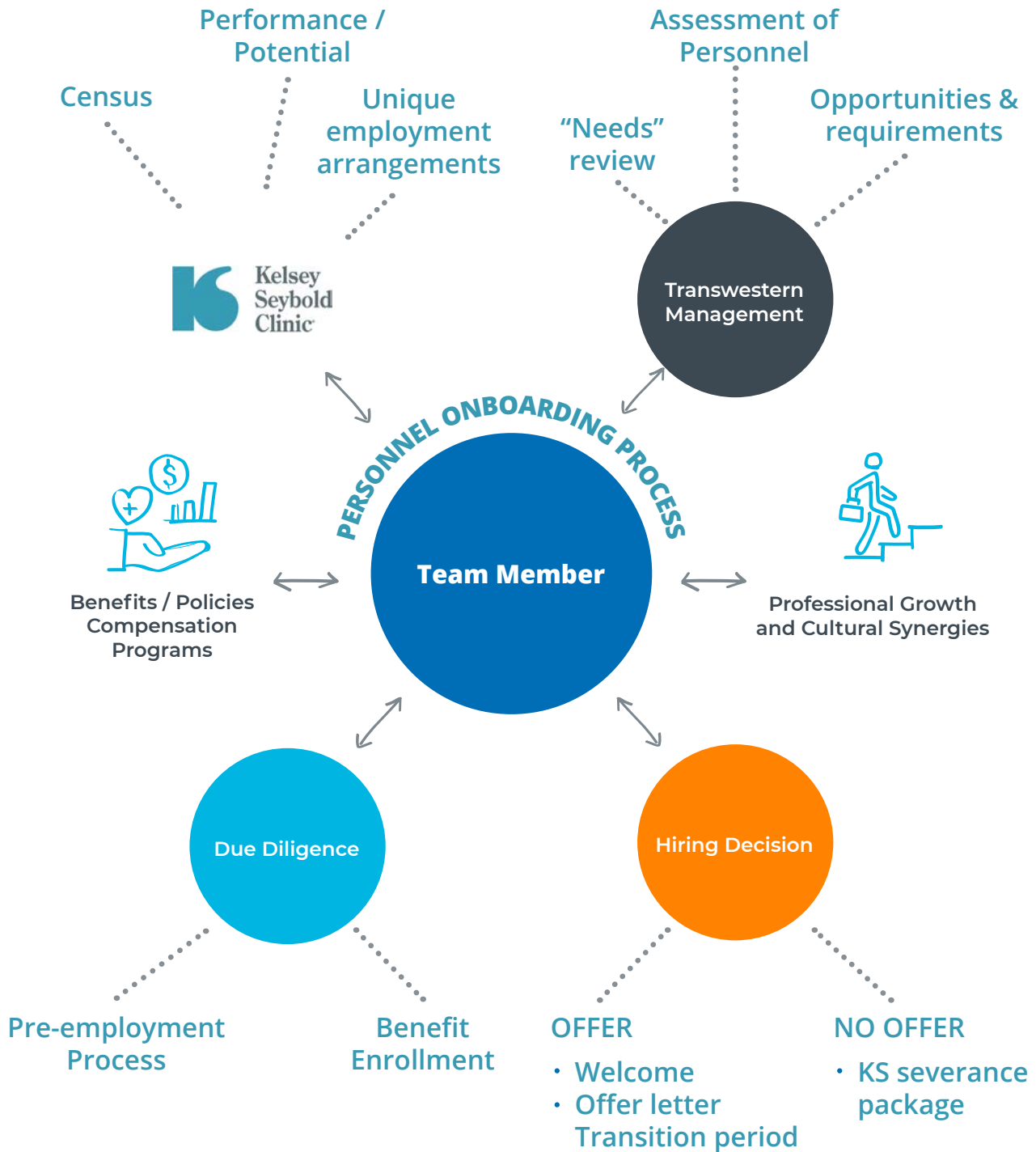
**ST** = Strategic | **INT** = Integration | **PRJM** = Project Management | **LA** = Lease Administration | **PER** = Personnel | **OPER** = Operations (FM & PM) | **ACCTG** = Accounting | **IT** = Technology | **IMP** = Implementation

||||| **ST** = Strategic

||||| **INT** = Integration

||||| **IMP** = Implementation

Your Transwestern Account Manager, Tressie Irvin, will be responsible for the comprehensive transition plan. She will be supported in the transition by the full compliment of Houston Asset Services leadership, and our corporate team for IT, Accounting, HR, Engineering and Legal.



Target dates will be established based upon Kelsey-Seybold's go live date to be established. The plan and timeline will be geared around a 60 day schedule to ensure smooth transition for onboarding

## Transition Team / Workgroups / Transition Plan Checklists



### Transition Teams

The transition team includes team members from the critical groups that are required when onboarding a property

- + Human Resources
- + Lease Administration
- + Client Accounting
- + Treasury
- + IT
- + Engineering
- + Compliance
- + Property / Facilities Management
- + Project Management

### Transition / Workgroup Calls

- + Calls are established on a recurring basis, typically weekly, or as desired by the client
- + Call to include all transition team members
- + Calls last 15 to 30 minutes, high level review of status of outstanding items and critical upcoming tasks or any issues to be discussed as a group
- + Checklist maintained by team members throughout the week, checking off items, adding notes, etc. as completed

### Transition Checklist

Organized by the three phases of onboarding an asset:

- + Pre-transition
- + At transition
- + Post transition

Within each phase, tasks are listed by area of operations (accounting, lease admin, engineering, operations, IT, etc.) and generally, in order of when tasks should be completed



## Pre-Transition

---

### Human Resources

- + Employment transition
- + Onboarding the employees
- + Orientation onsite or remote
- + Payroll

### Accounting/Treasury

- + Determine systems being used, initiate set up
- + Initiate data requests
- + Initiate contact client point of contact
- + Initiate bank account set up with treasury  
– takes a minimum of 2 weeks

### IT

- + Inventory current infrastructure and hardware
- + Determine need for transition
- + Produce budget for purchases

- + Data preservation
- + Setting up users
- + Lease administration
- + Abstract and input leases into accounting system
- + Review exceptions with ownership and asset services leader

### Operations/Administration

- + Orientating the employees (HR, accounting, IT, engineering)
- + Scheduling the building audit with regional engineer
- + Transferring contracts/service agreements
- + Setting up vendors
- + Obtaining coi's
- + Orientation and setup of MPulse work order and preventative maintenance system

## At Transition

---

### Accounting

- + Verify data – complete and accurate
- + Complete vendor setup
- + Finalize bank account information (as needed)
- + Obtain approval of test checks (as needed)
- + Discuss timelines with management team

### IT

- + Establishing the network and transfi
- + Phone systems
- + Ensuring all users have needed hardware and software
- + Transition data, emails, contacts, etc.

## Post Transition

---

### Operations/Administration

- + Establish the budget (capital and operating)
- + Implement Transwestern operational policies and procedures
- + Meet with each tenant
- + Meet with each service provider

### Accounting

- + Is property loaded in P2P and accounting system, all users have appropriate access
- + Verify ownership and management are in agreement with rent roll
- + Confirm bank account access is granted

- + Establish accounting calendar
- + Confirm opex and RET prepayments are entered
- + Verify teams understand their responsibilities for monthly process
- + Troubleshoot any ongoing issues

### Engineering

- + Create action plans from building audit
- + Implement safety protocol
- + Establish building MEP standard and contractor guidelines
- + Review and/or implement preventative maintenance program



*Describe your processes for escalating issues to your clients*

The Transwestern team for Kelsey Seybold will be led by Quentin Schmidt on Engineering, and Tressie Irvin, as VP and Account Manager. The Kelsey Seybold team will meet regularly with Steve Lammers as client as often as desired, typically weekly. Should additional attention be needed to any operational, staffing or execution item, John Wheeler, SVP Healthcare, and Steve Ash, Managing SVP Asset Services are available to bring leverage and high level response needed.

Finally, Transwestern is a private company, and we define our culture by our responsiveness and service to our clients. Our entire Executive Leadership is available as needed, starting with Kevin Roberts, President, Central Region.



How does your company define, measure, and improve customer satisfaction?

## Transwestern Experience

The Transwestern Experience is an innovative customer service approach reflecting Transwestern's unique culture. Focusing on points of contact, we endeavor to provide the highest level of service to all customers, from clients, tenants and business partners to our own team members. By being more intentional in our service delivery and paying extraordinary attention to detail, we enhance the tenant experience and create value for our clients.

Through the Transwestern Experience, all Transwestern team members and vendor partners are trained in this differentiated customer approach.

### Everything Speaks.

"Transwestern defines what it means to provide a higher level of service."

—KBS



## Our approach:



Consistently  
create positive  
service  
experiences



Everyone is a  
customer



Rupture  
industry  
service  
stereotypes



Build passion  
about purpose

**Intentional service = enhanced tenant satisfaction  
and value creation**

Transwestern understands that continuous improvement is fundamental in today's business environment. That's why we are committed to exploring new ideas and charting new courses. By elevating our service delivery through best practices and process improvements, we are driving operational excellence and maximizing value.

*Do you provide frequent business reviews with current clients? If so, what are common KPIs you use to track success?*

Transwestern meets with our clients regularly and conducts beginning of year reviews with each client. This review includes previous year major mile stones and achievements, goals for the upcoming year and a thorough staffing review including bonus review for eligible team members.

The account team and local leadership also connects with our clients to perform periodic reviews with our asset managers and client executive leadership.

We have assessed client satisfaction utilizing Kingsley, the gold standard for tenant satisfaction.

*What has your retention been for clients in the Houston area over the past 3 years?*

Transwestern has retained over 95% of all property/ facility management assignments over past 3 years in Houston. We have lost projects only to sales activity, and have a very good record of retaining projects when not being bought by a self-managed operator. Capitol Tower is an example of a project retained after sale in 2019 after setting the record sales price psf in Houston.

Our combination of experienced, team members, Transwestern resources all focused on the client, market leading technologies, and the Transwestern Experience culture wear well on our clients. They vote with their feet in expanding, and retaining their relationship with Transwestern for real estate services.



## The Results

Transwestern property management has outperformed the Kingsley Index consistently since 2002, when it adopted Kingsley's tenant satisfaction surveys. These exceptional scores are a direct result of the firm's personalized service and responsiveness.



### Houston Key Performance Indicators 2019

Overall Satisfaction	Value for Amount Paid	Renewal Intentions	Mgmt. - Overall Satisfaction
<p><b>4.60</b> <small>4.28 Kingsley Index</small></p> <p>Rating   ↑ 7.7 %</p>	<p><b>4.33</b> <small>3.93 Kingsley Index</small></p> <p>Rating   ↑ 10.2 %</p>	<p><b>4.26</b> <small>3.91 Kingsley Index</small></p> <p>Rating   ↑ 9.1 %</p>	<p><b>4.79</b> <small>4.49 Kingsley Index</small></p> <p>Rating   ↑ 6.9 %</p>

**Transwestern  
Tenant  
Satisfaction  
Survey**

**93%**

Satisfied  
response speed +  
efficiency

**90%**

Satisfied accuracy +  
attention to detail

**91%**

Satisfied  
collaboration +  
partnership

#### CLIENT RESPONSES

**“Great Communication  
All the time.”**  
— Strawn Pickens

**“Great management  
staff.”**  
— Houstonian Lite Club

**“Immediate response to  
any issues.”**  
— Ogden, Brooks & Hall

**That's a  
real estate  
term!**

How Does Transwestern  
Experience Training Add Value?

**Transwestern crushed  
the Kingsley Index for  
overall satisfaction!**

At the beginning of any assignment, we meet with the client and develop a customized Key Performance Indicator (KPI) program to ensure we are tracking and monitoring those areas that are important to our Clients' operations. Transwestern has the ability to measure performance in several different areas which will allow Kelsey-Seybold and Transwestern to identify areas for improvement, savings and overall performance. The purpose of KPI's are to implement a uniform method for Kelsey-Seybold to measure if the services achieve productive and attractive workplaces. The Kelsey-Seybold/Transwestern strategy is to deliver consistency and standardization across the portfolio.

Areas measured are Transwestern/Kelsey-Seybold portfolio metrics per the management services agreement, financial, utility occupancy or other performance metrics as mutually agreed. A dashboard tool provides management with a snapshot view of the entire portfolio with the ability to drill down for detailed information. We will develop the proposed KPI program in conjunction with Kelsey-Seybold.

### **Kingsley & Associates**

In addition, Transwestern's reputation is built on the concept of providing "Legendary Service" to our building tenants and our owner clients. Tenant satisfaction and the relationships the company cultivates with tenants are critical to our efforts to create value through the achievement of above-market retention rates and market leading rents. Transwestern's tenant satisfaction efforts commence with a smooth and transparent takeover of property operations and are enhanced by a tenant relations program designed to surpass the highest-quality services offered in competitive properties. Personal contact is supplemented by immediate on-line access to each of Transwestern's property managers and the ability to quickly generate work order requests through the property's website.

For years, we have used Kingsley & Associates to conduct interviews with our tenants and poll them on many areas such as problem resolution, staff communication, accessibility of our manager and engineers, responsiveness, and overall satisfaction. Kingsley is the industry leader in these tenant surveys, and they are retained by every other major property management firm.

Transwestern's results in these annual Kingsley surveys are consistently superior to our competition. Our ability to provide "Legendary Service" is the hallmark of Transwestern's management program. Our approach to customer service and focus on tenant satisfaction does not differ for tenants of different property types. We treat our tenants in the same manner and with the same degree of courtesy and professionalism, whether they are in a Class A office building, a warehouse/distribution facility, a medical office park, or either high-end or big-box retail space.

Since the Kingsley program inception in 2002, we have exceeded in overall tenant satisfaction with property management each year. These exceptional scores are a direct result of the personalized service and responsiveness provided on a daily basis.

- + Outscored the Kingsley Index in management rating areas that drive tenant satisfaction
- + Surpassed the Kingsley Index in maintenance, accounting and engineering

### *Please confirm the expected timeframe for replacement of open Day or Night staff positions.*

With approximately 40 million square feet under management in Houston, Transwestern has considerable local "bench strength" and are continually evaluating advancement opportunities within our current group of talented maintenance employees. Additionally, our National and Regional Directors of Engineering are very active in recruiting for the rest of our Texas platform, and spend time identifying talent from vocational and trade schools, vendors, and recruiting out of the military ranks.

We recruit continuously for top talent in managers, engineers and admins in the markets we serve. Our bench of over 35 million sf of team members is ready when a employee transition is required in Houston and for Kelsey Seybold.

## Customer Service Center

*Does your company maintain a 24/7 customer service center?*

*If your company does not maintain 24/7 availability, provide the hours below that it maintains for its customer service center.*

*If your company does not maintain 24/7 availability, describe how you would handle issues after hours.*

Transwestern manages 40 million sf of commercial and health care space and have for many years. In order to make sure we have the latest technology, most efficient delivery and best response times, we have employed third party experts to handle this for us. Calls are answered immediately and routed to the appropriate individual per the guidelines of pre-approved decision matrixes customized for each client. This allows us to employ, best practices and utilize the best technology and the most competitive pricing for our company and our clients.

*Do you have a call center?*

No, We can operate the existing call center utilized by Kelsey Seybold as needed, or relocate it as desired. Our teams are on point 24/7 for the demands of service and ready to engage when any emergency arises as well.

*If you have a call center, what are the hours of operation?*

N/A



## Issue Resolution

### *Outline your problem resolution methodology as a service provider*

When an issue or problem does arise, Transwestern listens! We gather the details of the issue including location, company, individuals, issue of concern, and we record all pertinent information. We record it in work order if related to services, we document if a liability event through security officers and manager interview. Transwestern is prepared to utilize the MPulse work order and preventative maintenance system Kelsey Seybold is using, supplemented by our extensive Angus PMs for virtually all systems being used in today's office buildings.

We take action to remedy! The Transwestern team connects with all relevant parties, and we investigate the facts and put in a plan of action to fix a service shortfall. If a liability incident, we notify all insurance parties in accordance with Client's procedures as well as Transwestern's.

No surprises! Our team will over the issues in our monthly report to our clients, or notify them immediately if of a more urgent nature. We craft our client notifications around the desires of the client. Finally, we document the issue and the results.

### *How are requests/feedback handled at the local level and then communicated to the corporate level within your organization?*

If a situation warrants, our onsite teams, call upon the vast corporate resources of Transwestern to reach a solution or identify the right leverage point for resolution. We are in the service business, no problem too small, our team is highly aligned to answer the call for any matter that surfaces needing attention or communication.

This is true of our Managers up to the Executive Committee.







# Technical Overview



*What current technologies do you use that promote efficient and smooth operations?*

## Engineering

Building performance and efficiency are key to securing the value of an asset. At Transwestern, our goal is to protect and preserve the integrity of the asset through the collaborative efforts of the engineering and property management teams. Engineers monitor and provide access to base building operations while ensuring maintenance and optimal performance of all building systems and infrastructure.

### Engineering Condition & Compliance Inspections

Detailed property inspections, most commonly performed at property takeover by our regional engineering leadership, assess the property and its mechanical systems provide an understanding of how building condition will impact financial performance. The utilization of a Computer Maintenance Management System (CMMS) effectively to track response times, service request completion with escalation capabilities.

We have an internal Inspector App program for property review, identifying ways to improve and insuring code/law compliancy

Transwestern's proprietary Inspector™ application, a mobile application used to gather observational data about equipment and property condition, includes workflow scheduling and reporting of issues to the property management team for immediate action.

### Preventative & Recurring Maintenance

The Preventative Maintenance program establishes standards for routine inspection by skilled technicians trained in the proper repair methods on a wide array of building systems and equipment.

We use industry-wide preventative maintenance programs such as Angus, Building Engines and Workspeed and have negotiated discounts with each. The systems provide the management team another valuable tool to manage and track scheduled preventative maintenance, while also providing a platform to efficiently track on-demand requests from our tenants and observations from the management and engineering team. This ensures the physical equipment operates at peak performance and provides a documented maintenance history.

### Benefits of a Comprehensive Preventative Maintenance Program:

- Increased asset life

- Better utilization of manpower

- Assignment, tracking and closeout of calls for the identification of recurring issues, inventory of parts, warranties and labor, and the ability to associate work orders to the general ledger for tenant billing purposes where applicable

- Electronic reporting to analyze speed of call completion, review compliance and address recurring issues

*How does your company keep up with the latest advances with technology and methods in your industry?*

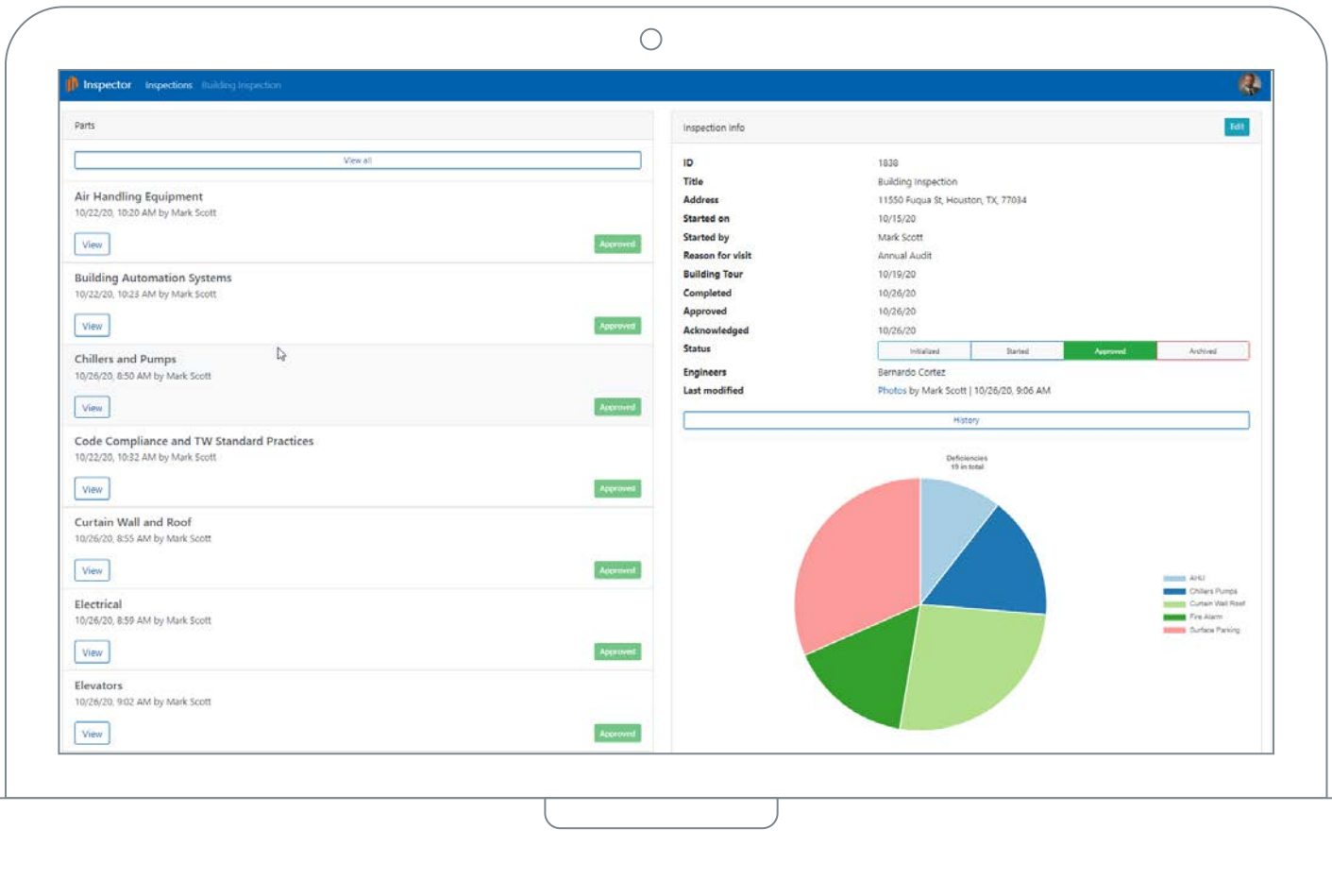
We have a National Engineering team that consists of Senior Engineers constantly discussing technologies with major manufacturers, product supplies chains etc. These are then reviewed by the National team on a regular basis. An example is the new technologies associated with COVID response and how it relates to our current operations in keeping our tenants safe. We have vetted many systems on how to effectively use U/V C lighting and Needlepoint Bipolar Ionization systems. We currently have over \$5m invested in projects over multiple markets.

*How would you introduce these changes to CLIENT?*

Upon completing an internal vetting process, we may present in different fashions depending on the product/ technology and the client. We typically will include a return on investment, cost benefit analysis and a complete bid process to include a formal RFP and qualifying bid document with recommendation for vendor and product.

*Provide examples of Service Report Forms, Posting Notifications, Quality Control Checklists, and any other report forms that will be utilized under this contract.*

## Transwestern Inspector Application Dashboard



Client Name <i>(strategic)</i>		Inspection Date	
Client Name <i>(other)</i>	Enter client name (if not strategic client)	Inspected By	
Project/Property Name	Project name (as listed in OneSpace)	Property Mngr	
Address 1		Regional Leader	
Address 2		Relationship Mngr	
City		Account Mngr	
State		Year Built	
Zip		# of Properties in Project	
Property Type			

Comment is required if condition is Poor or No \*  
\*Or if indicated with an asterisk

INSPECTION CHECKLIST	CONDITION	URGENCY OF ACTION	COMMENTS	REQUIRED
<b>PARKING LOT / PAVED SURFACES CONDITIONS</b>				
Asphalt / Concrete Surfaces - cracks, potholes, tree roots				
Curbs / Sidewalks - cracks, damage, raised areas				
Parking Lot Striping / Signage (including ADA) - condition				
<b>GARAGE</b>				
Stairwells Clean				
Striping Condition				
General Cleanliness				
Card Readers Operational				
Fire Hose Cabinets (Racked/Bagged)				
Elevator Equipment in Acceptable Condition				
Tamper Switches/Locks on Fire Valves				
Lightning Suppression System Condition				
Cameras Operational				
Structural Condition				
Entrance/Exit Gates Operational				
Ticket Dispensers Operational				
Lighting Condition				
Time Clocks/Photo Cells Operational				
<b>LANDSCAPING CONDITIONS</b>				
Turf Areas / Planters / Trees / Shrubs - condition				
Irrigation System - leaks, dead areas				
<b>GENERAL SITE CONDITIONS</b>				
General Cleanliness of Site - no debris, etc.				
Roof Drains / Gutters / Downspouts / Scuppers - clear				
ADA path of travel from public sidewalk to door-condition				
Monument Signage - correct and in good repair				
Site Furniture (Benches, Picnic Tables, etc.) - condition				
Loading Dock Areas - condition				
Access Ladders - locked and OSHA approved (as required)				
Site Drainage - adequate, catch basins clear, etc.				
Exterior Doors - clear of obstructions				
Trash Containers / Trash Enclosures - condition & cleanliness				
Storage of Hazardous Materials - condition & cleanliness				
Backflow preventer - Inspection Current (Yes/No)			Select Inspection Date	
<b>BUILDING EXTERIOR CONDITIONS</b>				
Exterior wall - condition (Masonry, Tilt-panel, Precast)			Select Wall Type	
Control Joint Caulking (if applicable)				
Painted Surfaces - condition				
Windows (including sealants) - condition				
Exterior Light Fixtures - condition of fixtures and light levels				
Stairways / Railings / Landings - condition				

### All Work Orders Volume By Property

Property	Total Work Orders Scheduled	Total: Completed	TR Work Orders Scheduled	TR: Completed	PM Work Orders Scheduled	PM: Completed	PM: Cancelled	Total Work Orders Scheduled Per 10K SqFt	Square Footage
1919 North Loop West	18	100 %	2	100 %	16	100 %	0 %	1.31	137,420
800 Peakwood	12	91.67 %	7	85.71 %	5	100 %	0 %	1.22	98,676
Bellaire	25	100 %	25	100 %	0	0 %	0 %	4.28	58,365
Greenhouse Medical Plaza	29	58.62 %	27	55.56 %	2	100 %	0 %	2.53	114,413
Kimberley Lane Building	2	100 %	2	100 %	0	0 %	0 %	0.31	65,085
Northwest Medical Plaza III	0	0 %	0	0 %	0	0 %	0 %	0	41,043
Sugarcreek Health Center	4	75 %	4	75 %	0	0 %	0 %	0.53	75,000
The Rose	3	100 %	3	100 %	0	0 %	0 %	0.89	33,532
Totals:	93	84.95 %	70	80 %	23	100 %	0 %	1.49	623,534

A hand holding a pen over a clipboard, with a teal abstract graphic overlay. The word "Invoicing" is written in a bold, teal font across the center of the image. The background is a blurred office setting with a desk and a chair.

# Invoicing

*Do you offer electronic billing and remittance processing capability?*

Transwestern currently offers electronic billing opportunities for our management fees and employee payroll to our clients utilizing our on-demand financial management and human capital management software, Workday. Electronic remittance processing is also available through several methods such as auto debit, wire transfer or ACH (electronic check).

*CLIENT requires consolidated monthly invoicing for proceeding month in a specific styled format; does your organization agree to comply with this requirement?*

Transwestern offers the flexibility to provide consolidated invoicing and will work with CLIENT to ensure deliverable meets their expectations and requirements.

Payments terms are EOM 60 days

*CLIENT minimum invoice requirements include, but are not limited to:*

- + Location & KSC Cost Center
- + Date of Service
- + Quantities for services provided
- + Pricing of service provided
- + Subtotal cost for each service provided – FYI – currently the system may not currently be able to provide this, however, we could perform manually.

*Does your organization agree to comply with this requirement?*

Transwestern is prepared to create client specific requirements as listed above as well as accept payment terms of EOM 60 days.



A photograph of a modern, multi-story building with large glass windows and balconies, set against a clear blue sky. The image is partially obscured by large, abstract teal and white shapes that frame the central text. The word "Reporting" is written in a bold, teal, sans-serif font, centered over the building's facade.

# Reporting



What are standard reports that you can provide CLIENT on a regular basis?

[Click here to download example monthly report](#)

Does your company have an online portal that can be used for accessing reports?

## OneSpace®

**OneSpace® is an online application accessible 24/7 that allows teams to collaborate and share files and documentation for all phases of management, engineering and accounting for a property.**

**Increase Efficiency:** Asset managers become more productive by utilizing the customized, user-friendly technical solution.



### Document Management system

Single centralized system for storage retrieval



### Risk Management

Tracking and reminders for vendor and tenant COIs



### Project Management

Timeline, task tracking and delegation for easy project tracking and reporting



### Property Calendar

Shared calendar to capture and promote property-related events, tasks and deadlines



### Vendor Management

Streamlined onboarding and oversight of all vendors (W-9 upload, OFAC review, vendor contact info)



### Access From Anywhere

Access from anywhere with an internet connection

## Say goodbye to wasted time.

- + Asset managers, building owners and other third parties can access property documents from anywhere via the internet
- + No cost to the property—the system saves money because records are stored electronically
- + “Google-like” search capability, and improved quality of service and communication on all levels
- + Collaboration across the team (property managers, engineers, accountants and asset managers)



A photograph of two women shaking hands. The woman on the left is wearing teal scrubs and is smiling broadly. The woman on the right is wearing a white lab coat over a white shirt and is also smiling. They are in a professional setting, possibly a hospital or clinic. The image is partially obscured by a large teal graphic element on the right side.

# **Pricing, Facility List, and Scope of Services**

[Click here to download KS IFM RFP Pricing](#)

Transwestern's Proposed Fee Schedule for our services in \$0.20 per square foot per year for each of the Kelsey Seybold facilities as provided. Specific fee per location is noted below.

Property Name	Address	City	SQFT	\$0.20
Baytown Clinic	6300 Garth Road	Baytown	11,000	\$2,200
Downtown at Esperson Tunnel	815 Walker Street	Houston	2,600	\$520
Downtown at the Shops at 4 Houston Center	1200 McKinney St.	Houston	23,000	\$4,600
Berthelsen Main Campus	2727 West Holcombe Blvd	Houston	315,000	\$63,000
Meyerland Plaza	560 Meyerland Plaza Mall	Houston	41,300	\$8,260
Sleep Center	3900 Essex Lane	Houston	6,800	\$1,360
St. Luke's Medical Tower	6624 Fannin St.	Houston	4,000	\$800
Tanglewood Clinic	1111 Augusta Drive	Houston	81,500	\$16,300
Woman's Center	7900 Fannin, Suite 2100	Houston	23,600	\$4,720
El Rio Medical Records	8282 El Rio St.	Houston	11,500	\$2,300
Harris County	1310 Prairie St, #990	Houston	760	\$152
Heights	TBD	Houston	10,800	\$2,160
Memorial City	929 Gessner #1450	Houston	12,743	\$2,549
River Oaks	2040 W. Gray #120 & 200	Houston	12,500	\$2,500
Westchase	TBD	Houston	22,000	\$4,400
<b>Sub-Total (Central)</b>				<b>\$115,821</b>
Conroe Family Medicine	690 South Loop 336 West	Conroe	8,800	\$1,760
Cypress Clinic	13105 Wortham Center Drive	Houston	74,000	\$14,800
Spring Medical and Diagnostic Center	15655 Cypress Woods Medical Dr.	Houston	130,900	\$26,180
The Vintage Clinic	10701 Vintage Preserve Parkway	Houston	65,000	\$13,000
Summer Creek Clinic Humble	8233 N. Sam Houston Pkwy. E	Humble	36,500	\$7,300
Kingwood Clinic	25553 U.S. Highway 59	Porter	54,000	\$10,800
The Woodlands Clinic	106 Vision Park Blvd.	Shenandoah	80,100	\$16,020
The Woodlands OBGYN and Women's Health	17198 St. Luke's Way	The Woodlands	15,800	\$3,160
North Channel	TBD	TBD	7,500	\$1,500
<b>Sub-Total (North)</b>				<b>\$94,520</b>
Sienna Clinic	7010 Highway 6	Missouri City	23,600	\$4,720
Pasadena Clinic	5001 East Sam Houston Tollway	Pasadena	36,500	\$7,300
Pearland Clinic	2515 Business Center Drive	Pearland	54,700	\$10,940
Fort Bend Medical and Diagnostic Center	11555 University Blvd	Sugar Land	72,700	\$14,540
Clear Lake Clinic	1010 South Ponds Drive	Webster	54,400	\$10,880
Pearland Administrative - PAOB	11511 Shadow Creek Pkwy	Pearland	169,500	\$33,900
Bryan Contact Center	TBD	TBD	25,000	\$5,000
Gulfgate	TBD	TBD	15,000	\$3,000
<b>Sub-Total (South)</b>				<b>\$90,280</b>
West Grand Parkway Clinic	2510 West Grand Parkway North	Katy	36,300	\$7,260
Katy Clinic	22121 FM 1093	Richmond	36,500	\$7,300
<b>Sub-Total (West)</b>				<b>\$14,560</b>
<b>TOTAL FEE</b>			-	<b>\$315,181</b>



**Facility  
Management  
Compensation  
& Fee Proposal**

Please include details for your proposal on each of the following categories:

### **1. Facility Management Fee at Risk and Incentive Compensation**

Transwestern is willing to put at risk a annual FM Fee of up 10% of the overall annual fee. We would ask that if we meet and exceed the mutually agreed to performance metrics, that Transwestern be considered for a 5% bonus award for service excellence.

### **2. Shared Savings - additional compensation beyond the Facilities Management Fee**

At Transwestern savings is what we do! We use a proven network of vendor service and supply partners who understand the leverage and expectations Transwestern has for our client's properties. We bid, and aggregate for maximum impact, and overlay our national contract elements for paper supplies, elevators, lighting and other items to the benefit of our managed properties. We do not wish to be paid for savings, but we will turn over all stones to ensure your properties benefit from our service for you.

### **3. Savings Guarantees**

We know that savings are there for every property, let our team go to work for you and we will show you the results.

We can discuss savings guarantees with Kelsey Seybold, once we are hired. This could be a performance metric to start with for us.

### **4. Capital Contribution**

Transwestern is a Service Provider and as such, we invest heavily in our people – their education, access to extensive training opportunities, support from senior leadership and expanded resources that a large management team can provide. We utilize the capital resources provided at the facilities, on behalf of our Clients, and will make recommendations for future investment in those facilities where we identify opportunities for securing lower cost or improved efficiency as part of our ongoing service.

### **5. Project Management Fees**

To the extent Manager has responsibility for the construction management, Manager will serve as construction manager for all tenant improvements, capital improvements, and other construction projects beyond the base construction of the building and base construction of the garage. Manager shall ensure that improvements align with all established design guidelines by the Owner. Owner will pay Manager a fee, which is a percentage of the total cost of construction approved by Owner, in accordance with the following schedule and as included in Manager's initial proposal:

\$0 to \$250,000 5%  
\$250,000 to \$1 million 4%  
\$1 million and up 3%

## **6. *Direct Support Costs***

The Kelsey Seybold team will budget all costs for managing the projects for each location. The support costs for the staff, for office locations are to be passed through with each location paying their respective share in operating expense. These expenses are presented to the client contact and approval is requested each year, and for any costs not budgeted that arise during the year.

## **7. *Technology and Transition***

Transwestern will cover the cost of our team members for the pre-transition activities, and will cover the costs of our corporate resources of Transwestern involved with the Transition period, such as our Technology group, human resource, asset services support. Direct costs for computers, telephones, and other direct delivery expenses are included in the budget and will be approved by client contact. There is a technology monthly fee that will be budgeted to support each computer users computer setup and ongoing 24/7 online care. We seek a transparent relationship, with no surprises.

Our internal resources are costs included in our FM Fee, and will be outlined in our FM Agreement.

## **8. *Environment of Care-Safety & Compliance***

Our efforts for Environment of Care-Safety & Compliance is handled directly by our management team, and is coordinated with our clients, and user groups. Life Safety, Workplace Safety and Healthy Workplace initiatives are at the forefront of all that we do.

[Click here to download sample standard contract for Kelsey-Seybold](#)



TRANSWESTERN

REAL ESTATE  
SERVICES