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Vice President, Strategic Development
ARAMARK Global Healthcare
Topics

• ARAMARK Healthcare Overview
• Global Trends
• Strategies for the Future of Support Services
ARAMARK Overview
ARAMARK Corporate Overview

- Market leader in Managed Services
- Largest private employer in the U.S.
- Fortune’s Most Admired Outsourcing Company
- Business Week Magazine
  - Most Ethical CEOs
  - The Best Managers
- Financial Overview
  - $13.5 Billion Annual Revenue
Our Reach

- 1 individual initiative needed to make a difference
- 15 national and state parks
- 22 countries with ARAMARK operations
- 30 ballparks, arenas & stadiums
- 40 convention and civic centers
- 60 conference centers
- 100’s suppliers & business partners
- 180 oil rigs, mines and other remote locations
- 350 sports & entertainment facilities
- 700 correctional facilities
- 1,000’s corporations
- 1,800 K-12, colleges & universities
- 2,500 hospitals and senior living communities
- 70,000 public safety agencies
- 120,000 refreshment services locations
- 250,000 ARAMARK employees worldwide
- 3,500,000 uniform & career apparel customers
- 11,000,000 national and state park visitors
- 30,000,000 convention & civic center visitors
- 60,000,000 healthcare patients & senior living residents
- 70,000,000 fans
- Unlimited potential to positively impact someone’s life

255,000 employees in 22 countries striving to provide world-class experiences, environments, and outcomes for our clients and consumers.
ARAMARK’s Global Presence

In addition to the United States, ARAMARK proudly serves in the following countries:

- Argentina
- Belgium
- Canada
- Chile
- China
- Colombia
- Czech Republic
- Denmark
- Germany
- India
- Ireland
- Japan
- South Korea
- Luxembourg
- Mexico
- Netherlands
- Peru
- Qatar
- Spain
- United Arab Emirates
- United Kingdom
ARAMARK Healthcare Service Portfolio

ARAMARK provides clinical support services to more than 1,000 healthcare clients across North America.

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Global Trends
We’re More Alike Than Different across the Globe: Balancing Cost, Quality, and Access

Public v. Private Health System

“Wait to Avoid Paying” or “Pay to Avoid Waiting”
Global Healthcare Trends

- Healthcare perceived as social benefit
- Moving from disease management to patient focus
  - Patient Satisfaction
  - Patient Safety
  - Infection Control
- Shift from sole focus on cost reduction to value and value creation
- Demand for standardization and compliance
- Accreditation from JCI and DNV
- Receptivity to explore business partnerships based on expertise
- International focus on Staff Safety/Security
Yonsei University Hospital

• 2000 bed hospital
  – Largest JCI accredited hospital in the world
  – First to be accredited in Korea

• Unique opportunity to work with them to change the culture and environment
  – Creating the vision for patient and guest experiences

• ARAMARK Masterplanning process will help YUHS create more satisfied workforce

• Sharing U.S. insights with the most influential provider in Korea
  – MDAnderson
  – Cleveland Clinic
Sichuan West Huaxi China Hospital

- Client since 2002
- Service: Housekeeping
- Beds: 4300+ (largest hospital in the world)
- Average Length of Stay: 9.99
- Outpatients: 2,785/day
Peking University Third Hospital

- Client since 2007
- Service: Housekeeping, CTD
- Beds: 1264
- Average Length of Stay: 7.9
- Outpatients/day: 9,000

“Small companies don’t instill confidence for such large organizations... We serve 10X the population as when we first opened in [1958]. We want the best equipment, best processes and the hearts of workers to understand their value in the medical and patient experience.”
Strategies for the Future of Support Services
• 89% of nurses say a clean hospital positively impacts how patients perceive hospital staff

• 87% of nurses indicate that when support services are coordinated and efficient, it makes them feel their hospital is well run

• 80% of hospital staff (executives, doctors, nurses, support staff) say support staff are an important contributor to patients’ view of the hospital

• 82% of hospital staff indicate that the hospital environment is critical to patient outcomes

• 75% of nursing say support services make a big impact on clinical care

Source: ARAMARK Healthcare Stakeholder Proprietary Quantitative Research
Guiding Principles for Relationships among Nursing and Support Services in the Clinical Setting

• Chief Nursing Officer as the Catalyst for Change
• Inclusive Shared Governance
• Clear Scope of Practice
• Shared Ownership of Patient Needs
• Culture of Mutual Respect and Recognition
• Safer, Less Stressful Physical Environment
• Continuous, Open Communication

Approved by AONE Board in January 2007
People Strategies

- Collaborative models break down silos that improve care delivery
- Employee Engagement
- Diverse employee populations
- Scarcity of/demand for middle management function – China, Korea, Chile, Spain
  - Labor management
  - Training & Development
- Health & Wellness
What Does Quality Mean?

- Focus on standards, process, procedures is global

- HCAHPS/Patient Satisfaction in the U.S. has little global relevance today, but changing

- NHS Quality Monitors

- For China and some others, the outcome is satisfaction with the government
Focus on Process, Metrics, and Outcomes

- Technology
- Evidence-based approach:
  - Metrics
  - Outcomes
  - Dashboards
  - Benchmarks
- Lean, 6 Sigma, Lean Sigma
Partnerships Provide Resources

• Gain access to world-class capabilities
  – Management Expertise
  – Innovation
  – Specific skill sets not available internally

• Enables leadership to focus on strategic initiatives
  – Chinese Government promotes outsourcing

• Global knowledge sharing & medical education