



IAHTM BOARD MEETING AGENDA

Via Zoom

Wednesday, January 11th, 2023, 12:00pm EST

AGENDA

- | | | |
|---|-------------------|------------------------|
| 1. <u>Conflict of Interest</u> | <i>Discussion</i> | <i>Meredith Bowery</i> |
| 2. <u>Approval of Slate of Officers</u> | <i>Decision</i> | <i>Meredith Bowery</i> |
| 3. <u>Thank you to Meredith B. and Welcome to Brendan O.</u> | | <i>Christy Carper</i> |
| 4. <u>Approval of Agenda</u> | <i>Decision</i> | <i>Brendan O'Neill</i> |
| 5. <u>Minutes</u>
(Approval of minutes from Board Meeting on 11/9/22) | <i>Decision</i> | <i>Brendan O'Neill</i> |
| 6. <u>2023 Strategic Planning Retreat</u> | <i>Discussion</i> | <i>Brendan O'Neill</i> |
| 7. <u>2023 Spring Conference Update</u> | <i>Discussion</i> | <i>Bill Moyer</i> |
| 8. <u>2023 Conference – Toronto Update</u>
(9/29/23 – 10/3/23) | <i>Discussion</i> | <i>Rocco Romeo</i> |
| 9. <u>2024 Conference Contract Update</u>
(5/3/24 – 5/8/24) | <i>Discussion</i> | <i>Christy Carper</i> |
| 10. <u>2025 Conference Contract Update</u>
(9/12/25 – 9/17/25) | <i>Discussion</i> | <i>Meredith Bowery</i> |
| 11. <u>Round Table Discussion</u> | <i>Discussion</i> | <i>Brendan O'Neill</i> |
| 12. <u>Date of Next Board Meeting</u>
(February 19 th , 2023, Las Vegas) | <i>Discussion</i> | <i>Brendan O'Neill</i> |
| 13. <u>Adjournment</u> | | <i>Brendan O'Neill</i> |

IAHTM Board of Directors VIA ZOOM

12:00pm-1:00pm EST

Wednesday, November 9th, 2022

In Attendance: President, Meredith Bowery, 2nd VP Charles Berge, Treasurer, Rocco Romeo, Directors: Bill Moyer, Chris Hansen, James Belliveau, Malcolm Pallos, Executive Director, Christy Carper

Absent: Brendan O'Neill

AGENDA TOPIC	DISCUSSION	ACTION TAKEN
Call To Order		12:03pm (EST)
Conflict of Interest	Meredith Bowery asked board members to declare now or before discussion.	<i>None at this time.</i>
Agenda	Meredith Bowery asked if there were any additions or changes to the agenda for today.	MOTION <i>It was moved by Chris Hansen; seconded by Bill Moyer that the agenda for today's meeting be approved as circulated; CARRIED.</i>
Minutes of Last Meeting	Meredith Bowery asked for any amendments/changes to the minutes from the 10/12/22 Board Meeting	MOTION <i>It was moved by Charles Berge; seconded by Malcolm Pallos, that the minutes from the 10/12/22 Board Meeting be approved as circulated; CARRIED.</i>
Financials	Rocco Romeo screenshared and reviewed the financials. Looking at the end of October IAHTM has about \$620,000 US in the bank. Year to date, a surplus of \$75,695. The 2023 budget was presented and reviewed with a projection of \$400,000 in Education Partner revenue. Discussion followed. Rocco R. stated that the revenue over expenses would be monitored and will have the accountant provide guidance if we are at risk. Meredith Bowery added that Sigmatex is interested in moving forward with being an Education Partner.	MOTION <i>It was moved by Meredith Bowery; seconded by James Belliveau, that the 2023 budget be approved as presented; CARRIED.</i>
2023 Strategic Planning Retreat	Rocco Romeo stated that the planning for the Strategic Planning meeting in Las Vegas in February is going well. Glenn Tecker will be the facilitator for this meeting. Discussion followed.	

2024 Conference Site Update	Meredith Bowery stated that Ed McCauley will be hosting the 2024 conference and that Palm Springs has been chosen as the location. Christy Carper and Ed McCauley will be traveling to the site on 11/16 to wrap up the contract.	
2023 Spring Conference Update	Bill Moyer alerted the group to the chosen date of 5/15 – 5/18, 2023 and discussed session and event planning.	
ARTA Economic Study Request	Meredith Bowery discussed the request by Dr. Overcash and ARTA for the membership to participate in providing data for the current economic study being done. Meredith B. explained what he is looking for and how the results are beneficial to IAHTM laundries and their marketing. Discussion followed.	ACTION <i>It was agreed to have Christy Carper send out the information and data request to membership.</i>
Committee Updates	Organic Growth – Rocco Romeo spoke on the valuable work this committee is doing and praised Brendan O'Neill for how well run and organized this committee is. It is planned for this committee to meet at the Strategic Planning Meeting in February. Texcare Committee – Meredith Bowery spoke about the logistical planning that came out of the October 26 th meeting. Many different routes and options were explored, led by Phil Hart and Carlos Fernandes. It was proposed that they would review the travel/route options with their people and then present a viable plan when we are all together in Las Vegas. Next steps would then be to reach out to membership.	
Round Table Discussion	Updates and discussion came from each board member surrounding topics of: working with Education Partners on Organic Growth Committee marketing models, newly hired CFO, planning for Toronto conference going well, business going well, keeping plant busy, non-compliant employees, environmentally conscience packaging, staffing and HLAC inspections.	
Next Board Meeting	Meredith Bowery stated that the next board meeting would be held on December 14th, 2022, at 12:00pm EST via Zoom.	
Adjournment	The meeting adjourned at 12:583pm EST	



UPCOMING IAHTM CONFERENCE AND EVENTS

2023

2/19 - 2/21 Strategic Planning Retreat – Bellagio, Las Vegas

5/15 – 5/17 IAHTM Spring Conference - Hilton @ Penn's Landing, Philadelphia

9/29 – 10/3 IAHTM Education Conference – Omni King Edward, Toronto

2024

5/3 – 5/8 IAHTM Education Conference – Omni Rancho Las Palmas, Palm Springs, California Rate Secured: \$269.00 a night, \$35.00 a day resort fee

11/8 – 11/16 Texcare

2025

*9/12 – 9/17 IAHTM Education Conference – Omni Ft. Worth, Texas
Rate Secured: \$259.00 a night*

MEET OMNI-FICENT 2.0

Limited Time Offer:
Bookable through December 31, 2022

OMNI-FICENT MULTI 2.0

Min Group Size 75 Pk/200 Contracted Rms Total

NUMBER OF MEETINGS CONFIRMED

Two Meetings Three Meetings Four or More

GRACIOUS HOST

Pre-Stay Communication Plan & Special Offers	✓	✓	✓
Refresh On Arrival - ROA	✓	✓	✓
Sanctuary of Success - Meeting Planner Office		✓	✓
Local Bites - Departure or Late Night Amenity Station			✓

MAGIC IN THE DETAILS

CS Concierge or Meetings Lifeline Liaison	✓	✓	✓
Experience Boost (one complimentary)		✓	✓
Visionarium - Board Meeting VIP Product Max 20 people			✓

OWN IT WITH YOU

Master Account Rebate** (room revenue only)	▲ 4%	▲ 6%	▲ 8%
Audiovisual Discount	15%	20%	30%
Attendee General Session Basic Wi-Fi Discount	▲ 25%	▲ 35%	▲ 45%
F&B Discount off one Full Audience Function*	20%	30%	40%
Bonus Room Upgrades per Meeting	▲ 4	▲ 6	▲ 8
VIP Amenities (\$50 value)	4	6	8
Say Goodnight to Hunger - Donation	Double	Triple	Quadruple
Flexible Attrition Allowance		▲ 25%	▲ 30%
Omni Select Planner Multi Meeting Bonus	▲	▲	▲

Bookable through December 31, 2022. Only applies to bookings for 2023, 2024 and 2025.

▲ = BOOK BY DEC 31, 2022 FOR DOUBLE REWARDS.

OMNI  HOTELS & RESORTS

OmniHotels.com

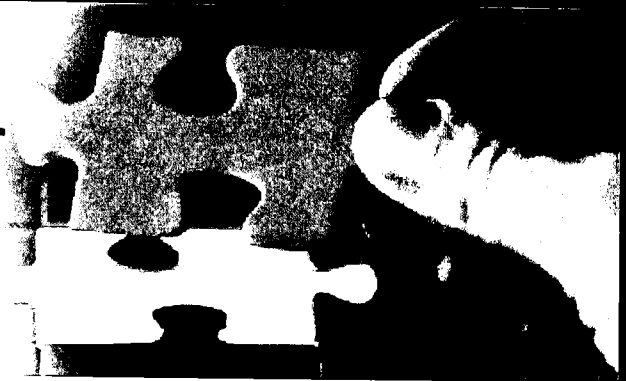
Terms: Subject to availability. Not applicable to citywides or MSA groups. Contracts must be signed in the same month.

*Master Account rebate applied on room revenue only. *Encore must be the sole audiovisual provider. F&B discount based on published banquet menu prices.

Draft Strategic Plan

August 2019

International Association for
Healthcare Textile
Management



IAHTM

INTERNATIONAL ASSOCIATION FOR
HEALTHCARE TEXTILE MANAGEMENT

Research • Strategy • Learning

TECKER
INTERNATIONAL

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Timeless Core Ideology

*Core ideology describes an organization's consistent identity that transcends all changes related to its relevant environment. Core ideology consists of three notions: core purpose, mission and core values. **Core purpose** describes the organization's reason for being. The **mission** describes who we are, what we do and how we do it. Our **core values** are the enduring principles that guide the behavior of the organization.*

DRAFT CORE PURPOSE

To create an environment where ideas and information can be shared.

DRAFT MISSION

IAHTM is a community of healthcare laundry and linen organizations and professionals committed to supporting, advocating, and promoting the healthcare textile industry through education, exchange of effective practices, and shared learning.

DRAFT CORE VALUES:

Trustworthiness

Demonstrated by a reputation for honesty and openness as a respected community of healthcare textile industry professionals.

Sharing

Demonstrated by a culture of information sharing and a commitment to lifelong learning.

Respect

Demonstrated by a common commitment to the industry and equal treatment of all members.

Vivid Description of an Envisioned Future

The Vivid Description of an Envisioned Future conveys a concrete, yet unrealized vision for the organization. It describes how the world could be different for key stakeholders and provides a clear and compelling catalyst as a focal point for effort. It is a vivid portrayal of intersection of what a group is passionate about, what they do best, and what they can marshal the resources to accomplish.

DRAFT VIVID DESCRIPTION OF AN ENVISIONED FUTURE

IAHTM is recognized as the leading education and development resource for healthcare laundry and linen professionals. IAHTM provides cutting-edge information and the exchange of ideas to improve the lives of members and their communities. Members find meaningful ways to engage in and contribute to IAHTM activities through the valuable learning and leadership opportunities provided. By supporting, advocating for, and promoting the healthcare textile industry, IAHTM raises the profile of the industry and advances members' interests.

IAHTM members are recognized as leaders in the laundry industry. Based on the information they receive through the association and other members, IAHTM members are prepared to adapt to change, adopt new technology, reduce their impact on the environment, and create successful operations. IAHTM member laundries are completely and competently staffed and their employees' job satisfaction rates are high. Customers are benefiting from lower costs with excellent services and IAHTM members are securing their future through capital investments.

Hospital patients enjoy hygienically clean linen due to the diligence and collaboration of IAHTM members. Patients receiving care serviced by IAHTM facilities appreciate a better hospital experience and develop fewer complications from preventable infections. Healthcare organizations spend less money on HAI's as a result of IAHTM's improved laundry processing and have reduced their carbon footprint due to IAHTM's efforts to eliminate the use of disposable textile items.

Communities continue to thrive as a result of stable employment in IAHTM laundries. IAHTM has forged innovative collaborations with other organizations to continue to increase value for IAHTM members and improve the industry for generations to come.

Draft Goals, Objectives & Strategies

Goals will serve the organization for the next three to five years. They are outcome-oriented statements that represent what will constitute the organization's future success. The achievement of each goal will move IAHTM towards the realization of its vision.

Objectives describe what we want to have happen with an issue. What would constitute success in observable or measurable terms? They indicate a direction – increase, expand, decrease, reduce, consolidate, abandon, all, distribute, none. Objectives have a three to five-year timeframe and are reviewed every year by the Board.

Strategies describe how the association will commit its' resources to accomplishing the goal. They bring focus to operational allocation of resources and indicates an activity – redesign, refine, create, identify, revise, develop, improve, enhance, implement, establish. Strategies have a one to three-year timeframe reviewed every year by the Board. They serve as a link from long-term planning to annual planning. Finally, strategies set strategic priorities for committees, staff and all other work groups.

Priority Key for Strategies:

Critical: Work on this strategy must be completed in the coming year

Immediate: Work on this strategy must occur in the coming year

Intermediate: Work on this strategy should occur in the coming year if possible.

Later: Work on this strategy can wait until subsequent year if necessary.

GOAL A: MEMBERS

IAHTM will be recognized for providing high value to its members by contributing to the ongoing education and development of healthcare laundry professionals.

Objectives:

1. Increase the number of members and engagement of existing members.
2. Increase leadership development for IAHTM members.
3. Increase the number of tools available to help IAHTM members succeed.
4. Decrease the impact of competition with other associations.

Strategies:

1. Engage with educational experts (e.g. university groups) on an on-going basis to provide continuous educational programs for distribution to IAHTM members. – Immediate (examples: TEXTCARE; conferences; survey; peer review; email/webinars)
2. Establish a trust fund to provide sustained educational information for IAHTM members and the facilities it serves (i.e. ARTA contributions to LCA studies). – Intermediate
3. Identify and affiliate with various associations and agencies to be recognized and called upon for our expertise in healthcare textile processing. - Immediate with HLAC and Later with other groups such as ACHE, APIC, AORN, AMA, CDC, UK, France, Netherlands, Belgium, Germany
4. Develop a series of learning opportunities to address the identified key drivers of change for the profession (e.g. sustainability; consolidation; labor shortage/increased interest in automation; availability of capital; threat of disposables; regulations/certifications) - Intermediate

GOAL B: PATIENTS

IAHTM laundries providing hygienically clean linens will result in better patient experiences and improved outcomes.

Objectives:

1. Increase awareness of the benefits of hygienically clean linen.
2. Increase supply chain audits to ensure compliance.
3. Consolidate multiple standards to a single agreed upon criteria for hygienically clean linens.

Strategies:

1. Develop communications strategy to increase awareness of the benefits of hygienically clean linen. - Intermediate
2. Develop a set of compliance procedures to ensure adherence to standards for hygienically clean linen. – Intermediate
3. Develop consensus within the industry of what constitutes “hygienically clean linen” – Later

GOAL C: HEALTHCARE ORGANIZATIONS

IAHTM will enhance their services by eliminating the use of disposables, which will result in lower costs and a reduced carbon footprint for healthcare organizations.

Objectives:

1. Increase sales resources.
2. Increase ROI.
3. Eliminate inaccurate perception.
4. Increase skilled workforce.
5. Eliminate space constraints.

Strategies:

5. Ensure adequate resources within IAHTM to effectively promote the advantages of reusables. - Immediate
6. Increase funding to ARTA for additional research and business case analysis – Immediate
7. Expand peer review to include marketing of reusable services. – Immediate
8. Enhance IAHTM's marketing committee to develop a business case analysis and/or tools supporting the marketing of reusable services. – Later

GOAL D: COMMUNITIES

IAHTM will provide education and resources to help members raise employees' satisfaction and reduce laundry's impact on the environment.

Objectives:

1. Increase the speed of the introduction of technology to the laundry industry.
2. Increase capital availability.
3. Increase stakeholder's awareness and support for the long-term sustainability of the laundry and keeping jobs in the community.

Strategies:

1. Invest in greater IAHTM administrative resources in an effort to expeditiously gather and share information with the membership - Critical
2. Organize plant tours with equipment vendors to illustrate our needs and emphasize the benefits to both parties. - Critical
3. Create a template for Capital Expenditure Requests to our stakeholders (including: needs, cost, ROI, employee and environmental impact, etc.). - Immediate
4. Publish newsletters about IAHTM member success stories that describe how other members and stakeholders might benefit. - Immediate
5. Create an on-going working group or committee to partner and work more closely with equipment vendors. – Intermediate
6. Create a "lobbying group" that conveys our needs for the urgency of advanced technology. - Intermediate
7. Expand the scholarship program and market it to members as it relates to technology and automation. – Later
8. Support automation by using current IAHTM education and knowledge to help train for specialized skill sets that will be required in the future. – Later
9. Expand the role of a "peer group" to not only audit operations, but also support and provide a strategy overview for acquiring technology and automation in the future.

Appendix A - Key Drivers and Implications

Key drivers of change are powerful forces that necessitate IAHTM develop strategies to address. They are conditions and dynamics in the relevant environment that will make tomorrow very different than today.

IAHTM'S KEY DRIVERS:

1. Sustainability
2. Consolidation
3. Labor shortage/increased interest in automation
4. Availability of capital
5. Threat of disposables
6. Regulations/certifications
7. Hospital Business Model

KEY DRIVER	IMPLICATIONS FOR IAHTM members	IMPLICATIONS FOR IAHTM
Sustainability	<ul style="list-style-type: none"> • Offer value • Economically viable • Value added • Loss of customers and trust • Work smarter, more efficiently • Be proactive 	<ul style="list-style-type: none"> • Sharing of ideas and success • Communicate the story of IAHTM success • Show sustainability to healthcare system • Needed linkages with other healthcare e.g. HLAC
Consolidation/shift of power	<ul style="list-style-type: none"> • Threat/target for-profit laundry • Venture capitalists • Larger laundries • Multi-plant laundries • Job loss • More skill/training experience • Monopoly – pricing concerns • More regulations • More layers of authority • CEO without industry experience • GPO's • New construction or additions to current plants 	<ul style="list-style-type: none"> • Fewer member organizations/ reduces possible members • Active search to find new members • Allow for organic growth • Other groups: for-profit laundry • Less members could lead to increased dues • Less sponsors • Less control/interest • Increase demand for education and type/variety • Advocacy role increases • Bylaw review
Labour/Automation	<ul style="list-style-type: none"> • Increased costs • Minimum wage increase • Labour availability/shortages • Robotics – higher skillsets – increased costs • Recruitment/retention • Educated, management • Survival • Growth • Cost reduction over the long-term 	<ul style="list-style-type: none"> • New vendors specializing in robotics • Share knowledge/educate • Manufacturing expertise • Better promotion • Education and training • Larger laundries/fewer laundries • Assist with touring automated plants • Provide peer support

	<ul style="list-style-type: none"> • Learning curve • Staffing/training • Re-design of plant 	
Availability of Capital	<ul style="list-style-type: none"> • Need to sell/justify/payback • Impact – positive • Courage – risk • Remain competitive • No access = failure • No investment 	<ul style="list-style-type: none"> • Third party • Success stories • How did you do it? • Analysis/payback • Lose members
Threat of disposables	<ul style="list-style-type: none"> • Threat – loss of volume • Closure – volume sensitive – shifting of costs • Pushing alternatives for clinical advantages to reusable • Disposables have more marketing money 	<ul style="list-style-type: none"> • Loss of members/volume • Share data/info
Regulations/certifications	<ul style="list-style-type: none"> • Higher costs • Best practices • Higher productivity • Uncertainty 	<ul style="list-style-type: none"> • Lobbying through membership • Educate members – stay at forefront • TRSA – opportunity to partner
Hospital Business Model	<ul style="list-style-type: none"> • Expansion of services – flexibility • Increased need for skilled functional specialist 	<ul style="list-style-type: none"> • Education of members • Education for consumer • Redefining our mission

Appendix B - Environmental Scan

CONDITIONS, TRENDS AND ASSUMPTIONS – DEVELOPED AUGUST 2019

These statements, developed by the group, help to purposefully update the strategic plan on an annual basis. Since the outcome-oriented goals that form the basis of the long-range strategic plan are based on the vision of the future that appears in this section, an annual review of this vision will be an appropriate method of determining and ensuring the ongoing relevancy of the goals.

Demographics:

Current Conditions

- Aging population – our workforce and the population
- Younger workforce – workforce expectations/culture/skill/motivation/work ethic
- Immigration – it's an issue and it depends on the side of the border you are on
- Political ramifications – related to immigration

Trends

- Decrease in pool of skilled candidates – from laundry workers to management
- Decrease in work ethic – due to the age of the population/millennials
- Increase in mobile workforce – no more jobs for life – people are moving around more
- Increase in regulations

Assumptions about the Future

- Decrease in dependence of employees – because the employee pool is going down, the business needs to adjust
- Increase use of automation and AI
- Decrease in required poundage we are doing, after the Baby Boomers are gone, and there will be a decrease in our laundry needs
- Decrease in number of patients as there is more homecare and increase in disposables
- Increase in global immigration to offset the decrease in workforce in North America

Business/Economic Climate:

Current Conditions

- Consolidation – smaller laundries are absorbed
- Cost pressures
- Privatization and venture capitalists
- Uncertainty in our world overall

Trends

- Decrease in contract management laundries to run the laundry – they are being bought by the venture capitalists
- There was fight to the bottom of prices and they couldn't sustain it
- You can't make a ton of money in laundry long term as hospitals have long term contracts
- Increase in venture capitalists – they want to make a quick profit
- Our laundries could compete on a quality service at a reasonable price – will we get to the point where quality matters?

- New customers could want better textiles, and higher quality at the price they are looking for, more support – better quality matters now than it did a few years ago
- Quality of linens – expectation that re-useables should exceed that
- People want vendors to do their job and they are willing to pay more for that –better quality, better software in your plants, higher controls, quality is important and the service level
- Decision makers in the hospitals are not impacted by what laundry does - the amount hospitals spend on laundry is a small amount – there is pressure to cost less, but it is a small percentage of the total hospital budget
- New regulation – HCAP - level of infection control
- Increase in “cost of doing business” – wages/supplies/tech.
- Increase in regulatory impact
- Increase in hospital consolidation and business model - less focus on patients and more on profit – everything else will be outsourced

Assumptions about the Future

- Increase in government dependency
- Increase in world free trade vs. nationalism
- Increase in complexity in doing business
- Carbon footprint impact

Legislation/Regulations

Current Conditions

- The environment is the big drive in our industry
- There is a push to limit the type of chemicals we can use based on environmental impact
- Water quality is a big issue – particles in microfiber are being found and limit/change this to improve water quality
- From a labor standpoint, legislation on undocumented workers will increase
- Pay and benefits – always increasing and creating issues with 15\$ and hour
- Health and Safety legislation
- Regs – HLAC certification – we are self-regulated and self-certified – infection control from a regulation side is driving us

Trends

- Increase in employer responsibility with legislation – we are more responsible for our employees
- Decrease in legislation in US vs. increase in legislation in US and Canada – legislation may decrease or plateau in Canada
- Increase strain on the workforce – legislation is tighter and tighter, harder to find people
- Decrease emphasis to “Go Green” in the US vs. increase in Canada
- Increase in certification of equipment – the equipment has to be certified
- Increase in local regulation / certain pockets of regulation – e.g. in NY you have to register your laundry – on the West coast you have to regulate how much water you can use

Assumptions about the Future

- Going to come down to the environment – water, energy, waste; eventually we will need to deal with that = one of the biggest issues, and government will require us to use less
- Post Trump – the US is likely going to become more of a socialist country – we will shift into more socialist - different pay grades – socialized health care
- Regulation – certification for a healthcare laundry will be required in the future – everything will be known – in terms of infection control – that will drive regulation (infection control will)

- The US is one of the last large Capitalist countries – we are probably not going to remain that way
- The cost of the small laundry is too small to maintain – small laundries won't exist in the future – the cost of legs and regs – will only be able to make that up in a mega laundry
- Sustainability – in legs and regs – water, energy and waste will become more sustainable

Technology & Science

Current Conditions

- RFID – moving towards RFIP chips in our textiles as we can charge for losses
- Strides in robotics – our ultimate goal is to reduce number of workers and reduce cost of doing business
- More controlled by computers and logic controls
- Smarter equipment – all the equipment is more sophisticated
- AI and robotics
- Infection control - textile composition is changing to help with IC
- Textile – using different materials, different things being imbedded in them
- Newer types of chemicals and other chemicals taking their place

Trends

- More automation – the companies that make the equipment are putting a lot of development and employee headcounts are going down as a result
- Automation will result in increased pressure on technical workers
- We will be able to remotely manage our facilities from a smartphone
- Great pressure on obtaining tech workers because of automation
- Increase in technology in textiles – smarter textiles
- Increased research in infection control – increase in the science of identifying and combating infections
- More chemistry and different chemistry – increase of other chemicals in other areas other than the wash

Assumptions about the Future

- Fully automated laundries and less human employees
- AI – in the future we will managing equipment and not front-line employees, therefore, the education level of the staff/people who will be monitoring the equipment will increase. Where will all the highly skilled, trained employees come from and will we train them from in-house staff as we go along?
- Technicians – the amount of people we will need on the technical side will go up
- Changes in textiles to self-disinfecting textiles – that will invert the wash we use/the way we do things now – that might decrease the time in the wash, and the chemicals we use – the textiles will change and be more advanced, and will change how we wash them
- “Bugs” will be harder and harder to kill in the future – there will be different types of germs in the future – we will have to find new ways to combat them – and that might be harder and harder – the big unknown in the future
- More robotics – the younger generation might attract new employees and they are excited and motivated to get into the industry
- Once the automation comes in, it will be incremental, it won't happen all at once
- What resources can we provide our members to help them with the automation transition – how can our association help each other with peer support

Healthcare Systems

Current Conditions

- Consolidation of hospitals and health care systems - they are becoming more powerful
- Death of independent hospitals and therefore, small laundries
- Increased power of group purchasing
- Compliance needs are going up
- Threat of disposables to our industry - lack of education around the advantages of reusables
- Sustainability is a real factor

Trends

- Increasing power of health systems resulting in an increase in market share
- Aging population continues to rise
- Increasing importance of the “business” of healthcare – looking at turnover of patients
- Increasing rapidity of negative information hitting the public – mainly due to the power, speed and influence of social media
- Decreased availability of beds for “ALCs”
- Increase use of outpatient settings
- Doctors are becoming employees – doctor’s salaries are going to go down
- Decreased budgets and lack of capital funding
- Increased outsourcing of non-medical related functions – ex. food
- Increasing socialism in healthcare and resulting impact on doctors’ income and work/life balance
- Quality of doctors –if US adopts healthcare for all, then the salaries could decrease
- Retail medicine – surgery centers – alternative sources
- Google and Amazon have gone back to the company doctor – and they want to treat people in-house and create their own hospitals
- Boutique-ing of the industry - different service– smaller clinics is a different model and it is a lot more work
- Amazon might be getting into the delivery of disposables with their large distribution centers
- GPOs - there is a cash flow, and Amazon might want to do it.

Assumptions about the Future

- Disposable companies continue to grow in influence, large companies that spend time marketing and lobbying
- Technology and preventative medicine could result in a decrease in number of patients – less in hospital, if alternative medical care become more prominent
- Venture capitalists buying laundries and leveraging them/consolidating them for greater profits under the short term (then looking to sell them for profit under a fairly short time frame)
- Sustainability increasing in importance – plastics/microplastics in water
- Laundries are very fragmented – and could we create a bigger group
- Sustainability – we are on the right side of the environmental impact of healthcare