SRS NETWORKS

FREE PLANNING RESOURCE

Senior Living Survey & RFP Workbook

Survey the site, compare field-work scope and document release decisions. Version 1.0 / October 2026.

A procurement planning aid for the operator, design team, platform provider and proposed field installer. Complete one site record per community. This is not a clinical procedure, approved design, compliance certification or quotation.

Program reference / date

Community identifier / municipality

Licensed setting / issuing agency

Included buildings / wings / workstreams

Assign decisions before asking for bids

Decision	Owner / backup	Evidence or approval needed
Facility access and resident communications		
System design / manufacturer compatibility		
Licensing / permits / authority review		
Platform configuration / commissioning		
Temporary response arrangements		
Physical work / test records		
Operational acceptance / final release		

Protect sensitive information

Use room and door identifiers, never resident names, health details, passwords or access codes. Keep detailed security drawings in the operator-approved project channel. Public inquiry forms need only a high-level scope.

Unassigned responsibilities / required clarification

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PROCUREMENT TEMPLATE

Survey the Installed System

Existing manufacturer / model / version

Proposed platform / authorized technical contact

Room, door and device inventory

Attach a full schedule when needed. Keep the same identifiers in drawings, labels, test records and closeout.

Room / door reference	Device / quantity	Power / cable / network	Keep / replace / unknown
Entry 1			
Entry 2			
Entry 3			
Entry 4			

Reuse requires evidence

Dependency	Observed condition / test reference	Decision owner / open action
Cable type, topology and condition		
Pathways, backboxes and mounting		
Power supplies, batteries and network		
Head-end / licenses / interfaces		
Model-specific compatibility		

Do not infer interoperability from a familiar connector, existing cable color or a working endpoint. Obtain the selected platform team's written requirements and decision.

Unsurveyed areas / access restrictions / follow-up date

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PROCUREMENT TEMPLATE

Define Occupied-Community Work

Record the operator-approved arrangements. The workbook does not prescribe temporary resident-response procedures or grant permission to interrupt a system.

Planning item	Approved arrangement / owner
Resident notices, escorts and room access	
Quiet hours / work and restoration windows	
Housekeeping, dust and protection controls	
Temporary response plan reference	
Clinical and platform team availability	
Stop-work / escalation contact	
Rollback or restoration plan reference	
End-of-shift condition / handoff	

Agree the pilot boundary

Rooms / wing / devices included

Conditions that make the pilot representative

Owner-defined tests and acceptance evidence

Hold points / restoration decision owner

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PROCUREMENT TEMPLATE

Build Comparable Bid Packages

Enter current quoted amounts and identify currency, quote date and validity. Blank means unknown. Separate one-time scope from recurring charges; never treat an allowance as confirmed installation cost.

Cost / scope category	Quantity or basis	Bid A	Bid B
Survey and design inputs			
Approved devices / spares			
Cable / pathway / power work			
Mounting / access equipment			
Occupied-area labor windows			
Staging / freight / receiving			
Configuration / licenses			
Testing / commissioning			
Removal / disposal / restoration			
Documentation / training			
Recurring service / term			
Taxes / travel / allowances			

Bid A source / date / currency

Bid B source / date / currency

Exclusions, unresolved quantities and written clarification references

Use a separate copy for additional bidders. Compare the same device schedule, work windows and acceptance package before comparing totals.

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PROCUREMENT TEMPLATE

Release Sites in Controlled Waves

A readiness score helps prioritize attention. It does not override a missing approval. Mark each gate Ready, Hold or Not Applicable with a reason and named owner.

Release gate	Status / evidence	Owner / due date
Approved scope and drawing revision		
Compatibility and reuse decisions		
Required authority approvals		
Received and checked equipment kit		
Power / network / pathways ready		
Operator access and continuity plan		
Platform and acceptance staff booked		
Open pilot defects dispositioned		

Portfolio wave record

Community reference	Archetype / platform	Wave / proposed date	Hold / exception owner
Site 1			
Site 2			
Site 3			
Site 4			

Decide before expanding

Pilot findings, corrected work instruction and approval to repeat

Record each community's exceptions. A common deployment standard does not make licenses, care settings or approval paths interchangeable.

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PROCUREMENT TEMPLATE

Accept and Reconcile the Work

Use the approved test method and pass/fail criteria. Physical completion, platform commissioning and operator acceptance are separate records.

Evidence package	Reference / result	Acceptance owner
Room / door / device schedule		
Cable and connection test records		
Functional test method / results		
Power and network dependency checks		
Operator-approved event path checks		
Defects / retests / accepted exceptions		
Labels / photos / revised drawings		
Removed assets / disposal record		
Training and operational handoff		

Close or hold explicitly

Physical work acceptance / date

Platform commissioning / date

Operator release / date

Open items / owner / due date

A closed installation ticket does not establish clinical acceptance, regulatory compliance or guaranteed emergency response. Retain the appropriate reviewers' approvals with the project records.

Planning guides: srsnetworks.com/nurse-call-system-replacement and srsnetworks.com/multi-site-senior-living-safety-rollouts