

Schedule of Accommodation

October 2024

Background

The intention of the design assurance (DA) review is to assess the quality and completeness of the project documentation and to examine the design processes being demonstrated.

To ensure that project design teams deliver on Health New Zealand expectations, it is important to clearly articulate what will be reviewed.

This document outlines those requirements and provides guidance as to how to complete and manage the project Schedule of Accommodation.

Purpose

The purpose of a Schedule of Accommodation (SOA) is to:

1. record each briefed room area for the project.
2. provide area totals for each sub department, department and project.
3. provide comments to capture dates and decisions for each room.
4. establish and record the briefing percentages for plant, facade, and engineering.
5. track the differences between AusHFG and project briefed areas
6. track the differences between project briefed and designed areas for each design phase, highlighting those areas that are +/- 5%)
7. provide a SOA project summary sheet that includes the totals for each department and project total across each design phase.
8. record the number of treatment spaces, procedural rooms and staff workspaces within the project; and
9. provide reporting consistency for all Health New Zealand | Te Whatu Ora projects.

Why do we ask to see this document?

The National Facility Design, Advisory and Assurance team will view this document as a key briefing tool that captures and tracks changes to room and project area requirements. This document is regarded as crucial to providing an accurate and time critical record at each design stage. Viewing this as part of the DA process provides us assurance that the proposed design aligns with the briefed requirements.

When do we expect to see this document?

The SOA is established at the commencement of the project and will be updated to record all decisions as content changes during each design phase by the project design team. Comparisons between the brief and designed SOA should be measured and recorded.

We expect to see the SOA at:

- ✓ Test of Fit
- ✓ Concept Design
- ✓ Preliminary Design
- ✓ Developed Design

What do we expect to see?

We expect to see the evolution of the project SOA from initial brief through each design phase with full transparency; we look specifically for evidence that project decisions are captured and are accessible. We also seek assurance that all relevant information is captured to facilitate a detailed peer review report.

The following content should be included:

Requirement	Description	Expectation	Insufficient information
1. Alignment with the level of detail	all decisions are captured and are accessible. All	✓ The document should reflect the	✗ Provision of meeting minutes to record room

Requirement	Description	Expectation	Insufficient information
<p>provided in the Health New Zealand Te Whatu Ora IIG example SOA.</p>	<p>relevant information is captured to facilitate a detailed peer review report.</p>	<p>same level of detail and content of the IIG SoA example.</p>	<p>briefing requirements.</p>
<p>2. Tracking deviations from the Australasian Health Facility Guidelines (AusHFG) HPU SOAs</p>	<p>All deviations from the AusHFG SOA areas are to be recorded in the SOA as the project progresses.</p> <p>Clearly capture all area deviations and innovations.</p> <p>NB: Project decisions / changes / deviations from AusHFG to be annotated in the project SOA remarks section</p>	<p>✓ Include the date of amendment and the reason for deviation from the AusHFG Health Planning Unit (HPU).</p> <p>capture all deleted, moved, split, combined, and shared rooms.</p> <p>Use the ‘when-what-who’ annotation system for all deviations.</p>	<p>✗ Document only includes the document date and revision history but does not identify the actual change detail.</p> <p>SoA has not been updated following client change request.</p> <p>Deleted rooms deleted have not been captured.</p> <p>Project changes are only noted in user group meeting minutes.</p>
<p>3. Client endorsement of the SOA at each design stage</p>	<p>Endorsement of the changes made during each design phase allows client visibility over the project by tracking all deviations from the AusHFG and project brief for each design phase</p>	<p>✓ Client endorsement is expected for each design iteration of the SOA.</p> <p>Provide a cover sheet with a table including name, title, role, and signature.</p>	<p>✗ Insufficient information includes not providing client endorsement of changes made for each design stage.</p> <p>An email from one person speaking</p>

Requirement	Description	Expectation	Insufficient information
	throughout the project.		on behalf of the wider group for all design items is not sufficient.

Additional support

SOA Technical Guidance Note and SOA Example

Project design teams should refer to the Technical Guidance Note and associated SOA example for detailed guidance relating to format, tracking, and annotation.

Questions or further assistance?

For any questions, please contact facility.design@tewhatuora.govt.nz and one of the National Facility Design, Advisory and Assurance team will be in touch.