

7.0 Schedule of Accommodation

Background

The intention of the design assurance review is to look at completeness of documentation and process.

To ensure that project design teams support the design assurance process, it is important to clearly articulate what will be reviewed so that project design teams have a clear understanding of what is expected.

This document outlines those requirements for the project **Schedule of Accommodation**.

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Purpose of the Schedule of Accommodation

The purpose of a Schedule of Accommodation (SoA) from a design assurance (DA) perspective is to:

- a) record each room type and associated area required for the project.
- b) provide area summaries for each department and project totals.
- c) provide a comments section to capture dates and agreed decisions.
- d) establish the briefing percentages for plant, facade, and engineering.
- e) provide a column to track the differences between briefed and designed areas (each design phase) for each room (highlighting those areas that are +/- 5%)
- f) Provide a summary sheet that shows the status of each department and project total across each design phase.
- g) record the number of treatment spaces, procedural rooms and staff workspaces within the project; and
- h) provide reporting consistency for all Te Whatu Ora projects.

Why do we ask to see this document?

The Facility Design and Advisory team are interested in viewing this document as it is a key briefing tool that captures and tracks changes to key room requirements. This document is regarded as crucial to providing an accurate and time critical record. Viewing this as part of the DA process provides us assurances that the design package aligns to what is required and expected.

When do we expect to see this document?

The SoA should be established at the commencement of the project and 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 for all design phases:

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

What do we expect to see as part of design assurance review?

Transparency of process is important; we will be looking specifically for evidence that project decisions are captured and are accessible. We also seek assurance from the SoA format and inclusions that all relevant information is captured to facilitate a detailed peer review report.

During the DA review we will be looking to see the following areas:

| Requirement | Description | Expectation | Insufficient |
|---|---|---|--|
| 1. Content, detail, and format that aligns with Te Whatu Ora example. | We will be looking specifically for evidence that all decisions are captured and are accessible. We seek assurance from the SoA | ✓ The document should reflect the detail and content of the SoA example template. | ✗ Provision of meeting notes to record room briefing requirements. |

| Requirement | Description | Expectation | Insufficient |
|---|---|--|--|
| This includes a departmental total summary for each phase | format and inclusions that all relevant information is captured to facilitate a detailed peer review report. | | |
| 2. Tracking of deviations from the Australasian Health Facility Guidelines (AusHFG) to be recorded. | <p>The document should record any agreed deviations to the AusHFG standard component areas as the project progresses.</p> <p>All variations and innovations should be clearly captured and easily accessible for the life of the project.</p> <p>NB: Project decisions / changes / variation from AusHFG should be stored in the SoA comments section and the room data sheets.</p> | <p>✓ Document should record the date, amendment, and reason for the change from the AusHFG Health Planning Unit (HPU).</p> <p>The SoA should record deleted, moved, split, combined, and shared rooms as well as the revision.</p> <p>Project design teams are encouraged to use the 'when-what-who' annotation system across project changes.</p> | <p>✗ Document only displays the document date and revision history but does not identify the actual content which has been changed.</p> <p>SoA has not been updated following client change request.</p> <p>Information that a room has been deleted has not been captured.</p> <p>Project changes are only noted in user group meeting minutes.</p> |
| 3. Evidence of client endorsement of the SoA at each design stage | The SoA is regarded as a fundamental project management tool. Endorsement of the changes made during each design phase allows client transparency over the project by tracking any deviations from the AusHFG and project | <p>✓ Client endorsement is expected for each design iteration of the SoA.</p> <p>A cover sheet that provides a table to contain name, title, role, and signature is recommended</p> | ✗ Examples of insufficient information include not providing required client endorsement of changes made for each design stage such as an email from one person speaking on behalf of the wider |

| Requirement | Description | Expectation | Insufficient |
|-------------|---|------------------------------|-----------------------------|
| | brief for each design phase throughout the project. | to be included with the SoA. | group for all design items. |

Additional support

SoA Technical Guidance Note and example template

It is recommended that project design teams refer to the Technical Guidance Note and associated SoA example template for information as to the required document format, detail, and content.

Questions or further assistance?

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