Health New Zealand
Schedule of Accommodation

Technical Guidance Note

Health New Zealand
Te Whatu Ora

This document is available at **tewhatuora.govt.nz**

Contents

Abbreviations

AusHFG – Australasian Health Facility Guidelines

NFDAA – National Facility Design, Advisory and Assurance team

FDB – Health Planning Unit - Functional Design Brief

FFE – Furniture, Fixtures and Equipment

GDA – Gross Departmental Area

GBA – Gross Building Area

HPU – Health Planning Unit

IIG – Infrastructure and Investment Group

NS – Non-Standard Component

RDS – Room Data Sheet

RLS – Room Layout Sheet

SOA – Schedule of Accommodation

SC –Standard Component

SC-D –Standard Component – Derived

TGN – Technical Guidance Note

UCA – Unenclosed Covered Area

Introduction

The National Facility Design, Advisory and Assurance team (NFDAA) have introduced a framework to guide the prioritisation, planning, design, and delivery of health facility projects and to support project design teams in meeting Health New Zealand | Te Whatu Ora expectations.

For reference to the *NZ Design Guidance and Assurance Framework* and other project support documents, please refer to the following link
Facility Design Guidance Resources

A Schedule of Accommodation (SOA) is used to store and manage the project brief.

It is expected that a project SOA will be established using the most relevant Australasian Health Facility Guideline (AusHFG) Health Planning Unit (HPU) SOA and that all project deviations relating to area and the allocation of spaces from the start to finish of a project. will be captured in this document.

This Technical Guidance Note (TGN) steps though the processes and sets the expectations for all Health New Zealand | Te Whatu Ora capital health projects.

The Framework outlines the project investment and delivery lifecycle.

- **Phase 0**: Identify, includes the Future Facility Plan and Models of Care, which are required to inform to the Health Planning Unit Functional Design Brief (FDB).

- **Phase 1**: Define, includes early functional design briefing and Schedule of Accommodation development, which informs Master Planning and Test of Fit Design, before moving into Concept Design.

In line with the Framework, the NFDAA are developing a suite of guidelines and templates, including the SOA example that is a companion document to this TGN.

The objectives are to:

- support the design industry in the delivery of appropriately formatted and adequately detailed SOAs.

- provide the steps needed to develop a SOA from briefing stage, through design, and into project delivery.

- provide for greater transparency across the development of a project SOA reporting with particular focus on tracking changes against AusHFG HPU SOAs.

- achieve consistent reporting formats and outputs.

- include the level of information required by the design assurance process.

- provide an example SOA that includes the required level of detail.

1   Australasian Health Facility Guidelines

Health New Zealand | Te Whatu Ora expect that the Australasian Health Facility Guidelines (AusHFG) HPU SOAs are used to establish the project brief.

Standard Components are a key feature of the AusHFGs and provide detailed information on commonly used rooms and spaces.

The language, content, and codes used in the project SOA should align with the AusHFG.

This TGN should be read in conjunction with the following:

- **AusHFG Part B**: Health Facility Briefing and Planning
- **AusHFG Part C**: Design for Access, Mobility, OHS and Security.

2 Creating a Project Brief SOA

The SOA is a list of the spatial requirements within a HPU and is a product of the FDB.

The AusHFG HPU SOA is to be used to establish and inform the briefing SOA. Where no direct AusHFG HPU SOA match to the project exists, the closest AusHFG HPU match should be applied, and a record kept of the project actions to adjust the HPU should be captured in the SOA remarks section.

2.1 Recommended Steps

The following steps should be used in establishing a project SOA:

Refer to the SOA example document (Example – Schedule of Accommodation) when reading this section.

1. Download a copy of the relevant HPU SOA/s and store for project version record (Refer tab 1 – Example – Schedule of Accommodation)

2. Take a copy of the downloaded SOAs and combine into a single excel file, creating one sheet per department*(Refer tab 2 – Example – Schedule of Accommodation)
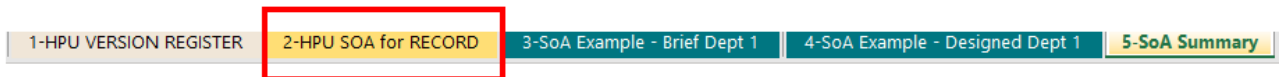
3. Retain the most relevant point of care option and remove the remainder.
   (Some HPUs have multiple options for functional areas (i.e: B.300_7 Emergency Unit contains data for 5, 15, 30, and 60 bays) areas (i.e: B.360_7 Intensive Care Unit contains data for 14, and 56 beds (4 pods)*
   (Refer tab 3 – Example – Schedule of Accommodation)
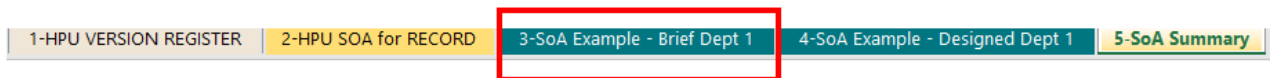
4. Ensure there is a common format and layout system for capturing departments, sub departments and rooms that can be adopted throughout (again the AusHFG have a few variations across the various HPUs)

5. Ensure the number fields are formatted as number fields in excel (many will download as text fields which complicates native formulas)

6. Include 1 single decimal point place in numeric fields.

7. Under the column 'SC/SC-D' replace 'yes' with SC, SC-D or NS (refer Section 2.4)

8. Ensure all room codes and names are consistent across the project (refer Section 3.6)

9. Amend room name format to remove commas and use key word system (refer Section 3.6)

10. Retain all remarks and pre-fix with 'AusHFG' so the origin can easily be identified.

11. Ensure the sub-department values for circulation are applied in the project SOA.

12. Ensure any shared areas are not duplicated across HPUs.

*Further considerations: recommend organising all project HPUs into a single excel sheet initially for the following reasons:

- This enables a consistent column and layout structure to be established for the project.

- This facilitates easy sorting to ensure consistency of room naming, coding, areas, and general data prior to splitting into separate HPU sheets.

- Room codes can be checked for consistency (some inconsistency may be found in source AusHFG data)

- Totals can be added and tested prior to splitting the sheets as required.

Note: if importing into an external database management system or software, the HPU sheets will typically need to be combined into a single sheet.

2.2   Important considerations

- It is important to retain and use the 'remarks' section to track all changes from the original AusHFG HPU data as the project progresses through the design phases.

- AusHFG Room codes (representing the Standard Components) should be recorded alongside each standard and derived project room.

- All designed areas reported in the SOA should be calculated using the methodology described in AusHFG Part C.

- Appropriate software should be used to manage the project data throughout the project design phases and the project brief SOA should be digitally linked to the designed response.

- Handbasins and workstations are typically scheduled separately in each AusHFG HPU SOAs (in the same way as rooms) and will need to be amended. Handbasin's and workstations should be amalgamated into rooms and the room area increased accordingly - or incorporated into bays where appropriate. Toilets may need to be

clustered to create a single room with toilet cubicles in some cases. Workstation counts can be consolidated into open work areas as required.

- External areas should be moved from the body of the AusHFG SOA and pasted into an external areas section at the base of the SOA. These areas should be calculated separately to the departmental area.

2.3   Room Names

The room names and codes used in the project SOA should align closely with AusHFG SC names, so that they are easily identifiable, and a level of consistency / standardisation is achieved. Exceptions to this may include the abbreviations of room names to assist with the automation of labelling on the architectural set - especially relevant where specialised software is used to manage the project data. (Refer Section 3.6)

2.4   Standard Rooms

Identification of Standard Room types provide standardisation opportunities (one-to-many approach) for the project. Standard Rooms are also known as AusHFG Standard Components which are commonly used rooms and spaces across healthcare projects.

The current AusHFG HPU contains a SOA that lists rooms and indicates those that are a 'Standard Component', 'Standard Component – Derived' or a 'Non-Standard' room.

A separate column in the SOA should differentiate which standard room type applies as follows.

- Standard Component (SC)

- Standard Component Derived (SC-D)

- Non-standard component (NS)

Where a project includes duplicated Non-Standard Components (not included in AusHFG SC set), these rooms should be identified as Project Standard Rooms and included in the project SOA and Standard Room List (refer Standard Room Summary Statement)

In some specialised HPUs, AusHFG SC's will not exist for all rooms. Where this occurs, these rooms should be described in the Specific Design Requirements section of the project FDB.

2.4.1   Standard Components (SC)

AusHFG SC provide detailed information on commonly used rooms and spaces across healthcare projects. Each Standard Component has an associated Room Data Sheet

(RDS) and Room Layout Sheet (RLS).
Standard rooms (including deviated Standard Components) should account for approximately 75% of a project.

2.4.2   Standard Component Derived (SC-D)

Standard Component Derived (SC-D) rooms are any Standard Component rooms, where the proposed room area, room function, and Furniture, Fixtures and Equipment (FF&E) room contents varies from the description in the AusHFG SC room data sheet. Derived rooms are based on AusHFG SC where the balance of the room data information is closely linked to the original SC. These derived rooms will also be included in the standard room percentage count for a project.

2.4.3   Non-Standard (NS)

Non-Standard Rooms (NS) are HPU-specific rooms, and do not exist in the AusHFG Standard Components list. Where possible, it is recommended that a similar room type SC is used as a starting point for all non-standard rooms.

Non-Standard rooms should be broadly described in the FDB to provide:

- description and function,
- location and relationships, and
- other considerations.

2.5   Project Standard Rooms

Project Standard Rooms are the combination of:

- AusHFG Standard Components; and
- duplicate rooms not covered by the AusHFG SC list.

Duplicate rooms should be identified in the SOA using the room code suffix: PS (Project Standard Room). This will allow project teams to manage all duplicate rooms across the project in a standardised manner using a one-to-many approach.

The project standard rooms should also be included on the **Standard Room List** and stakeholder endorsed early in the design process (refer Standard Room Summary Statement)

2.6   Briefed Area Allocation – Circulation, Travel, Engineering, Planning and Façade

The SOA should include the circulation allowance as suggested below:

- Circulation % are provided for each sub-department in the AusHFG HPU's and these figures should be incorporated for comparison purposes into the project SOA.

- Travel and Engineering % should be referenced from the AusHFG Part C Schedule of Allowances for Travel and Engineering and agreed with the project team ahead of being applied to the project SOA.

- Planning contingency façade and seismic internal bracing area allowances may or may not be relevant to the project and should be discussed and agreed during the project initiation phase.

2.7   Corridors

Project corridors should be included within the SOA as follows:

- Circulation is applied as an AusHFG briefed percentage for each subdepartment when forming the initial FDB SOA.

- Circulation relates to departmental corridors contained within the department footprint - it does not include travel between departments.

- As corridors are added to the design, they should be added to the SOA as 'rooms' in separate rows - avoid creating a single space for a complex corridor layout.

- The total areas of designed corridors should be compared with the briefed percentage values (AusHFG HPU) in the project SOA.

- Corridors should be separated in the planning to ensure a room number appears in logical locations for each corridor run.

2.8   Area variations

The initial SOA report should include the AusHFG briefed room areas and the project room briefed areas with a column added to highlight the variations between these two.

Once the design evolves and area measurements are available for each room, the **project briefed areas and the designed areas should be recorded with the discrepancies between these two highlighted in a separate column for each design phase.**

Diagram: The progression of a project brief SOA to the designed SOA
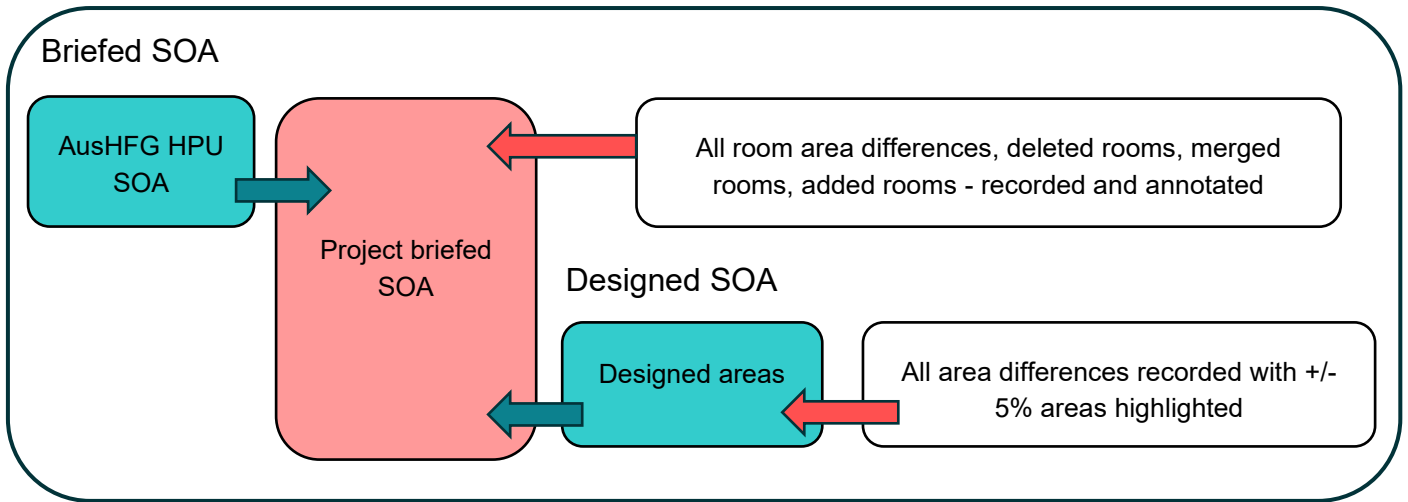
Once the project SOA variations from the AusHFG have been accepted: the endorsed project SOA becomes the baseline and all variations between this and the designed areas for each design stage should be highlighted as summarised below:

- SOA is to highlight any designed areas under or over briefed areas by + or - 5%.

- Red text denotes areas under 5%

- Amber text denotes areas over 5%

- Black text denotes areas that fall within the 5% margins.

2.9   Rooms added and deleted

The SOA is to record the justification for any rooms that have been added or deleted in the SOA remarks section.

- Additional rooms should be added in a new line with comments to include the word 'added' (for filtering purposes) and notes saying when, why and by whom.

- Deleted rooms should be reported in the SOA with an area of '0' and captured in the design phase report as a PDF'd SOA. Once reported and endorsed by the project stakeholders, the deleted rooms can be removed from the SOA.

- Deleted rooms are best identified using grey text in SOA reports.

2.10   Rooms moved

Rooms that are moved into another sub-department or department should be managed in the following way:

- The original room should be deleted and identified using grey text and zero area recorded.

- The reason for the change should be included in the remark's column along with a note stating where the room has been moved to.

- An identical room should be added to the alternative sub-department or department with a comment to indicate where the room has moved from.

2.11   Room templates

- Room templates are data sets that contain the combined room data (i.e. area, function, finishes, services, & FF&E data)

- The room templates can be set up or imported to represent the information contained within the AusHFG standard components.

- The template codes should match the AusHFG Standard Component codes.

- These templates should be used to track any variations.

- Tracked variations to the templates will include changes to recommended room size, room description, services, finishes, and FF&E.

- Any unique rooms that are non AusHFG and occur only once, are to be coded so that they are recognised easily (i.e. suffixed with project acronym e.g. PRJ)

2.12   Key Functional Unit Count

The count for the three functional units described below, should be captured across all departments for the project. This data may be included as an option in the formal SOA report but should always be accessible to validate the briefing requirements.

When included in the formal SOA report, a column should be provided for each of these three categories:

- Patient spaces (bed / chair)

- Procedural / Treatment spaces

- Workstations

Capturing this information, enables a quick check of the briefed-to-designed numbers in each department and enables visibility over the course of design against FDB scope.

2.12.1 Patient Spaces – Bed / Chair

- Include a count of each, as well as a total for each department of the following room types:

  - All inpatient bed, cots or chair spaces across all departments. A patient bed / chair space includes all overnight inpatient beds, medical assessment bed spaces, short stay bed spaces, procedure chair spaces, (for multi-bedrooms, all patient spaces should be counted)

  - Patient chair spaces include infusion chairs for chemotherapy and renal dialysis and exclude de-escalation / high care / seclusion rooms and bed holding bays such as for patients waiting to enter imaging rooms or operating theatres.

2.12.2 Procedural / Treatment Spaces

Include a count of each, as well as a total for each department of the following room types:

- Operating Theatres and Procedure rooms (including Endoscopy)

- Medical imaging diagnostic rooms, Interventional Radiology rooms (including Cardiac Cath Labs)

- Emergency Department Patient Treatment Bays

- Treatment rooms, Consult/examination rooms, Podiatry Treatment, Dental Surgery.

- Excludes: Interview Rooms, Plaster Rooms, Multi-function / Allied Health Rooms

2.12.3 Staff Workstations

Include a count of each, as well as a total for each department of the following room types:

- Staff workstation space in all offices, workrooms, and open plan office spaces.

- Excludes clinical workstations such as those in operating theatres, radiology control rooms, computers on wheels, reception desks, staff stations and storeroom workstations.

2.13   Remarks / Room Notes in the SOA

For reporting purposes, it is important to include comments that track the project changes in the SOA using a clear and consistent format as described below. This means that the information is widely accessible.

- Retain the original AusHFG room remarks. For clarity, these comments can be identified with an 'AusHFG' prefix.

- Add any project specific remarks ahead of these so the most recent commentary appears at the top of each cell. This ensures that the data is organised according to the timeline, with the most recent being filterable in xlsx reports.

- Use a consistent annotation format so that the column can be filtered sensibly

- Start with the date and avoid using any symbols. A 'when/what/who' system is recommended (example: '230419 room moved from support TK')
Regular checks for consistency in the early phases of briefing is important to ensure the team are adhering to the annotation strategy.

- Keep notes clear and concise and minimise the over-use of acronyms.
Exceptions can be made for some common and repeating examples (i.e. UG1 = User Group number 1)

- Always include the initials of who has made the change so queries or issues can be quickly resolved with the right people.

- If a room has moved from one area to another, commentary should be provided to indicate clearly where the room has moved 'from' and where it has moved 'to'.

- If the project room area is changed from the AusHFG area, always include commentary that states the figure it has reduced 'from' - as the new figure will be evident.

Examples of remarks are provided below:

220407 room added for NZ context TK

220301 added to meet building code reqs JH

220407 5m2 room moved to clinical support for NZ context TK

220407 room added for NZ context TK

220407 10m2 room moved to acute zone UG5 JH

220402 optional room required UG2 CJ

- R for roof levels

*Mezzanine levels can also be captured to sort in excel SOA reports by adding a suffix to the level code or name. Example L1 – level 1, L1.5 - level 1 mezzanine

3   SOA IIG Example

3.1   Departmental briefing Stage SOA

This section relates to creating a SOA for individual HPU's / departments.

(Refer tab 3 – Example – Schedule of Accommodation)
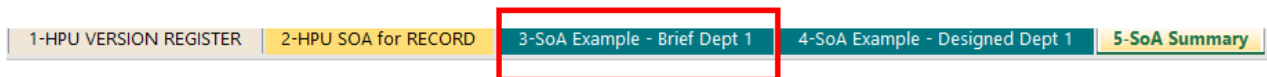
The SOA should reflect the following:

- xlsx format with one worksheet per HPU in an excel workbook.

- HPU sub-areas should be consistent with AusHFG layout (i.e: Entry/reception, Patient areas, Clinical Support areas, Staff areas, Shared areas)

- Summary sheet (described in Section 3.4) including individual HPU data.

One column each is required for:

- Room name (in key word format)

- Room location (e.g., Inpatient Unit) and sub location (e.g., Patient Areas)

- AusHFG room code.

- Unique room number/ identifier.

- AusHFG area (m^2)

- Project briefed area (m^2)

- Room count (number of duplicates)

- Room type (Standard Components SC, Standard Components - Derived SC-D, or Non-Standard NS)

- Functional unit count (Patient Bed / Chair Spaces, Procedural / Treatment Spaces, Staff Workstation Spaces)

- Comments noted in the remarks section to track SOA movement and deviations from AusHFG HPU SOAs.

One row each for:

- HPU sub-area totals (net m^2)

- Total net HPU areas (m^2)

- Total Functional Unit count.

- Total Intra-Departmental Circulation (% within the HPU) m^2

- Gross Departmental Area (Project GDA) m^2.

- External areas (courtyards etc) m^2 located at bottom of SOA so as not to combine these areas in the building total.

3.2   Departmental design stage SOA (follows briefing phase)

This is a development of the project brief SOA and builds on what has been established above and should include the following: (refer tab 4 – Example – Schedule of Accommodation)

| 1-HPU VERSION REGISTER | 2-HPU SOA for RECORD | 3-SoA Example - Brief Dept 1 | 4-SoA Example - Designed Dept 1 | 5-SoA Summary |
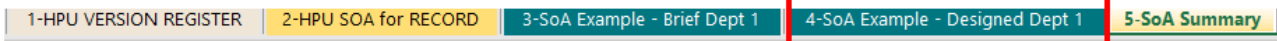
- Each individual room listed as one occurrence per row.

- Designed areas (measured in accordance with AusHFG Part C)

- Designed areas for external spaces (separated from internal areas)

- Comparison of required (FDB) and designed areas for each consecutive design phase.

- Coloured indicator for briefed to designed area discrepancies of +/- 5%.

- Categories to organise the project rooms into types (SC, SC-D and NS); and

- Corridors (circulation), travel (stairs) and engineering listed as separate rooms and coded accordingly in the AusHFG Code column (eg: PRJ-C for corridor, PRJ-T for travel and PRJ-E for engineering)

3.3 Departmental designed Area Reporting – Circulation, Travel and Engineering

- Circulation (corridors) and engineering / plant areas are to be reported as individual rooms for each sub-department and their designed areas recorded and compared to the briefed circulation, travel and engineering % area allocation.

- The designed areas for circulation (corridors) are to be totalled for each sub-department and compared with the AusHFG circulation percentages.

- The designed areas for engineering and travel are to be totalled for each department and compared with the nominated AusHFG travel and engineering percentages as outlined in Part C.

- Vertical travel (I.E. stairs and lifts) can be captured on each floor and given a VTR prefix to the room code to identify.

3.4 SOA Summary Sheet and total project area reporting

If there is more than one department in a project, separate departmental SOAs should be produced, and the combined departmental totals should be reported on the project SOA summary sheet.

(Refer tab 5 – Example – Schedule of Accommodation)

| 1-HPU VERSION REGISTER | 2-HPU SOA for RECORD | 3-SoA Example - Brief Dept 1 | 4-SoA Example - Designed Dept 1 | 5-SoA Summary |

Recommendations include:

- The summary sheet should include the date and SOA version.

- The summary sheet should reference the individual department worksheets.

- One row should be provided for each for each department.

- include the total briefed HPU area (Gross Departmental Area (GDA) and designed total HPU area (GDA) with a column that demonstrates the area HPU GDA difference.

- A remarks column to explain any significant movement between phases should be provided.

- One row should be included respectively for the briefed engineering and travel area % allowance allocation, designed areas and comparison between the two.

- A project total area summary should be provided (Gross Building Area - GBA)

One column each is recommended for the:

- Functional unit count totals.

- Total Net Functional Area (NFA) m^2.

- Total Intra Departmental Circulation (IDC) within the HPU (m^2)

- Total external area (m^2)

- Grand totals for each column.

- Gross Department Area (GDA) m^2.

- Comments in the remarks section to explain SOA movement.
  NB: These columns should be repeated consecutively for each design phase.

Project total summary includes a row that includes the:

- Briefed travel and engineering % totals (m^2)

- Designed travel and engineering area totals (m^2)

- Façade % totals (m^2)

- Planning contingency and seismic internal bracing area allowances %

- Gross building area (GBA) m^2

3.5   Unenclosed covered area and external areas

- Unenclosed covered and external areas are to be measured separately and are in addition to GBA.

3.6   Room naming conventions

The room names provided by the AusHFG should be edited when setting up the project data to ensure greater standardisation and to future proof the data for application.

While the recommendations listed below, assume a database is used to manage the project, making these changes will greatly improve any SOA regardless of the application of data software solution.

- Remove redundant words from the room name. This will be advantageous should these room names be applied to the general arrangement plans as room labels. Removing the word 'room' throughout is a good starting point

- Capitalise all room names in preparation for room labelling

- Remove any symbols from the room names: example 'Cleaner's Room' becomes 'CLEANER'. Remove hyphens as these upset some data formulas and delete any commas found in room names. Employ a strict numeric and alpha system for room naming

- Amend room names to embed the key word strategy: example – all storerooms should have STORE at the start of the room name: example 'After Hours Drug Store' becomes 'STORE DRUG AH', all bedrooms should have BED at the start of the room name.

- Abbreviate long room names so the label will fit inside the room on the general arrangement plans: example 'Toilet - Accessible' becomes 'WC ACC'

- Understand how the room names will filter in excel to help guide the process

Notes

....

....

....

....

....

....

....

....

....

....

....

....

....

....

....

....

....

....

....

....