

## 22 Tools Available to Assist with Equipment Planning

It is essential that the equipment planner has a good understanding of both word processing and spreadsheet software. Spreadsheet software provides a good base for the development of an FF&E schedule and services document. Depending on the skill base of the user, it can provide for many expanded options including reports, pivot tables and linking to online data.

Word processing software is essential to generate reports and general communication.

A working knowledge of a project manager program would be a valuable asset to an equipment planner's tools. It provides access to structure timeline charts such as Gantt Charts.

Online document management and project management software for construction, engineering and facility management is commonly used on major projects. It is highly advisable that all communications should be managed through such a system.

There are many healthcare project data management systems available on the international market which can generate the FF&E schedule, the Room Data Sheets (RDS) and the Schedules of Accommodation (SOA), as well as several equipment management databases.

Budget planning is generally time specific and costing for project items should be carefully reviewed by the equipment planner as part of the ongoing budget review.

It is however important to remember that FF&E is part of the whole project package and is best managed through the selected project database to ensure there is no duplicate and conflicting information. Management of data in one database will make clear what is to be signed off at the end of the project.

The preferred database should be identified at the beginning of the project or when the equipment planner is engaged so that there is no confusion with the collation of information.

It is worth noting that many databases will allow both download and upload FF&E schedules from a spreadsheet format.

The architectural team will generally have access to graphic representations of FF&E items whether in 2D or 3D drawing formats to aid the architect with placement of equipment in the floor plan and will be required on most projects, although this is not necessarily the responsibility of the equipment planner.

### **Software Set-up and Customisation**

There are many databases worldwide which are used to manage capital projects and equipment.

It is essential that equipment planners familiarise themselves with the preferred option. Options include:

- HFBS [www.healthdesign.com.au](http://www.healthdesign.com.au)

The Health Facility Briefing System (HFBS) is an integrated suite of web-based applications which users can be used to assemble and customise the detailed brief, specifications, Room Data Sheets (RDS) and obtain editable Room Layout Sheets (RLS) on the web without any software. It offers the health industry powerful tools and techniques for rapid service planning, briefing (space programming), facility planning, design, costing, equipment scheduling and maintenance of healthcare facilities.

Users can Log onto the HFBS website through a standard web browser, access comprehensive Standards, Guidelines and Medical Templates including over 500 unique room types for Healthcare Design.

- Proprietary equipment planning software such as Attania
- Databases designed to list suppliers, manufacturers and provide a standard nomenclature system for products, such as ECRI: Soucebase.

### **Building Information Modelling (BIM)**

The complexity and construction of health care facilities, as well as the increasing intricacy of healthcare design, requires sophisticated solutions, such as Building Information Modelling (BIM),

to augment the design of healthcare facilities and allow architects to accurately plan, place, and inventory medical equipment through the design, documentation, and construction phases of a project with three-dimensional modelling.

## 23 Equipment Planning Checklist

From the commencement of the engagement, it is valuable for an equipment planner to have a planning checklist. This helps avoid leaving out any steps required to ensure that the FF&E process develops in a structured and orderly way and that all relevant parties and associated communication processes are in place. It needs to be developed very early from the time of engagement.

Maintain good communications with all the relevant key stakeholders through the project is vital and all processes need to be shared and agreed with. This keeps everyone on the same page.

Clear understanding of the equipment planning teams required KPI's will also help ensure the maintenance of a good project management timeline.

This checklist represents the information which could be expected to be provided by equipment planners in capital healthcare projects, although the order of delivery shown in each phase may not be the order of delivery which suits the individual project team.

It is offered as a guide only and should be used and moulded to suit each project's individual requirements.

### *Design Phase*

- Confirm contract requirements
- Review all relevant project briefs
- Establish contact list of relevant key stakeholders of project
- Confirm any planned meeting schedules with key stakeholders of project
- Establish responsibility matrix
- Maintain ongoing communication with key members of the project team
- Establish KPI's
- Identify FF&E packages to be managed
- Verify any transitional FF&E to be incorporated into project and budget planning
- Confirm room FF&E requirements
- Identify equipment requirements and develop schedule of equipment
- Review of RDS
- Define and develop FF&E services package and generic product specifications
- Review architectural drawings and SOA for FF&E fit and related clinical way finding
- Provide and/or review RLS
- Develop FF&E Budget
- Development procurement plan and timeline
- Identify early purchases
- Identify potential suppliers
- Provide best for project procurement options for all FF&E
- Ensure probity process is understood
- Identify warehouse requirements for procured FF&E
- Conduct risk analysis.

### ***Construction Phase***

- Maintain ongoing communication with key members of the project team
- Develop tender evaluation and selection approval criteria
- Develop tender contracts, RFT, EOI, and RFQ
- Obtain approval to proceed with tendering process
- Coordinate tender evaluations and selection process
- Obtain confirmation approval to proceed with preferred suppliers
- Manage selected supplier packages post selection
- Identify any user group education and training packages required
- Incorporate FF&E into the facility management package
- Manage and coordinate warehousing of FF&E
- Confirm receipt of goods or services process
- Confirm installation and commissioning process
- Coordinate installation of FF&E into the building including commissioning
- Supervise commissioning & testing of FF&E
- Coordinate user group education and training sessions
- Assist with post completion transitional process
- Collate all FF&E documentations for handover
- Sign-off/ project handover.