



## Phased Plan Review

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## Topics for exploration

- Objective of Phased Review
- Demonstration Projects
- Benefits
- Approach
- Common key features of phased review
- Challenges
- Standardize process or not....



## Objective Phased Review



- Significantly reduce the total time to design and permit healthcare facilities

## Demonstration Projects



- Focus on the review side of the process
- Detailed review schedules
- Lots of milestones
- Presumes that the major design decisions have been made or can be made rapidly
  - *Program*
  - *Entitlements*
  - *Licensing*

## Benefits



- Reduced rework of design documents, due to early identification of code compliance issues
- Improved level of design code compliance
- Reduce time it takes for new services to become available to the public
- Improved staff efficiency and satisfaction

## Excerpt from SB 306



- ...the office, in its sole discretion, may enter into a written agreement with the hospital governing authority for the phased submittal and approval of plans.
- The office shall charge a fee for the review and approval of plans submitted pursuant to this subdivision.
- This fee shall be based on the estimated cost, but shall not exceed the actual cost, of the entire phased review and approval process for those plans.
- This fee shall be deducted from the application fee pursuant to Section 129785.

## Approach



- SB 306 provides OSHPD with broad authority to design phased review systems that meet the needs of our clients
- Many options are available, each project will be different
- Identify and “experiment” with a limited number of approaches, to determine their overall efficiency and effectiveness
- Interim approaches during experiments

## Common key features of phased review



- Early involvement of FDD
- “Small Batches”
- Significant review effort prior to submittal of final plans
- Commitment of Design Team resources

## Challenges



### FDD

- Staff resources
- Meeting our commitments
- Project tracking
- Documenting design concepts that have been reviewed and accepted
- Dealing with changes in the design
- Resistance of Staff to a change in the process

## Challenges



### Design Team

- Staff resources
- Meeting their commitments
- Project tracking
- Documenting design concepts that have been reviewed and accepted
- Dealing with changes in the design
- Resistance of Staff to a change in the process

## Standardize process or not....



- What are the pros and cons of standardizing the process
- Options
  - *No rules, just right...*
  - *Minimum requirements plus “customizable” features*
  - *Standardized process/regulations*

## What Should the Agreement Cover?



- What are we trying to achieve
- Milestones and deliverables
  - *How much detail is to much?*
- What happens when things go wrong
  - *Incentives for meeting commitments*
  - *Don't punish the project if things go wrong*