

Pre-design planning assessment templates

This is a series of templates that help you define your existing shade provision, and where it may need enhancement:

1. Site data (including analysis of observation areas)
2. Overall site analysis
3. Patterns of use and user profiles
4. Assessment of existing shade

Use these checklists/assessment templates in conjunction with a site plan to record characteristics of the site.

1. Site data

Site: _____ Date: _____

Report completed by: _____

Thoroughly record site conditions to ensure position and design of shade systems do not clash with physical aspects of the site.

If the site is large it may be helpful to divide the site into manageable sections and complete a checklist for each section. This could be separated by key use areas or topographical features.

Keep a copy of this site investigation with the site plan for future reference.

| | |
|---|---|
| Facility type e.g. pool, playground, footpath | Site location e.g. Rockhampton, hilltop |
| Access hours | Seasonal operation e.g. All year round, April to October, Summer only |
| Age of facility | Surrounding land uses e.g. Parkland to North west |
| Site contact Name: Contact details: | |

Site data—Observation areas

| | |
|--|--|
| Key observation area boundary e.g. toddlers pool precinct | General orientation e.g. North/South axis |
| Site fixtures e.g. BBQ, spectator seats near pool | Main activities e.g. play, swimming |
| General topography e.g. flat, north-facing slope | Main ground surface e.g. grass, paving |
| Existing shade structures General comment only, more details given in Design Factors Checklist | Existing vegetative shade e.g. shrubs, shade trees |
| Predominant canopy material e.g. dense trees, translucent fabric | |
| Predominant surface materials, both horizontal and vertical | |
| Total area covered by shade canopy | |

2. Overall site analysis

Undertake this analysis on-site and cross-reference with the site plan.

Existing structures

- Complete [Design Factors Checklist](#) for existing shade structures.
- Decide which are worth retaining.
- Look for opportunities to integrate these structures as part of shade development.

Existing utilities

Take note of the locations of:

- Power lines
- Water supply lines
- Sewerage lines
- Stormwater lines.

Existing vegetation

Assess:

- Predominant species
- Maturity and general condition of all planting
- Consider effect of future growth
- Consider which trees or planting beds to be retained
- Complete [Natural Shade Checklist](#) for vegetation to be retained.

Existing outdoor furniture

Assess the play equipment, seats, water taps, rubbish bins. Consider:

- Which should be retained
- Which may be suitable for relocation
- Positioning of new/additional furniture.

Surfaces

- Assess UVR reflectance characteristics of all surfaces (expert consultants are available to measure UVR levels).
- Note which surface treatments to be retained or modified.

Sight lines

Do you need to maintain sight lines:

- Within the site?
- Across or over the site?

Pathways and movement patterns

Review and assess:

- Entry and exit points
- Movement paths—are they direct and clear?
- Emergency access requirements for people/vehicles from the site and from adjacent areas/buildings.

Drainage

Consider:

- Problem areas
- Any improvements that may need to be undertaken.

Prevailing breezes and winds

Take note of:

- Beneficial breezes
- Unfavourable winds which will need to be blocked.

Unique features

Note any feature trees, water feature or public art. Consider if these features should be:

- Maintained
- Removed
- Relocated

3. Patterns of use and user profiles

If the site is currently unused, refer to other similar sites for guidance on the patterns of use of future users. Consult with user representatives. Consider weekday, weekend and evening use when completing checklist.

If several groups use the site, complete an individual checklist for each group.

| | |
|--|------------------------|
| User group e.g. spectators, competitors | |
| When using site e.g. month, season, all year round | |
| Predominant activities on site | |
| Time of day | Number of participants |
| Average duration of activity | |
| Spatial needs of activities e.g. clearance zones, overhead clearances, dimensions of marshalling area | |
| Spatial needs of equipment e.g. manoeuvring pool heating blanket rolls | |
| Future needs / long term use e.g. will users increase in numbers over time? | |
| Safety requirements e.g. sightlines, clearance for emergency equipment | |
| Cleaning and maintenance procedures e.g. special procedures, regular maintenance, who is responsible and have they been consulted? | |
| Is inclement weather protection required? | |

4. Assessment of existing shade types

For each shade type complete the following checklist.

Include all shade present on site—constructed, natural, combination, or, shadows cast across the site from adjacent buildings or vegetation.

- Locate all existing shade systems on the site plan and 'map' their shade for key use periods throughout the year.
- Note the effect of both overhead and cast shade on the site plan.

This assessment should be conducted in conjunction with the [Shade design factors to limit UVR](#) and [Natural shade](#) checklists.

Type of shade: _____

Does shade system satisfy all criteria listed in *Shade design factors to limit UVR* ?

- Do people use the shade provided? If not, why not?
- Does shade fall when and where needed during times of use? (refer to patterns of use checklist and site analysis)
- Do overhead canopies and side screens provide maximum UVR protection?
- Do surfaces/materials have non-UVR reflective qualities?
- Does vegetation satisfy all criteria on the *Natural Shade Checklist*?
- Is it suitable for all users?
- Is the shade convenient and comfortable to use?
- Are appropriate facilities and furnishing available?
- Is it climatically comfortable?
- Is it accessible to all users?
- Does it offer shelter as well as shade?

Outcome: shade will be removed / relocated / retained as existing / retained but improved

Source: Queensland Health (1997) *Shade for Young Children - Planning Sun-safe Outdoor Environments in Queensland*, p 32-38.