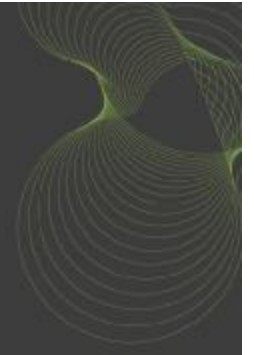


bre



Post Occupancy Evaluation: An introduction

Mindy Hadi, BRE Sustainable Development Group
SFC Event 9th July 2009



Why POE?

Construction is an expensive business

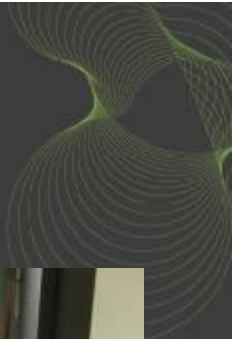
How do we know when we have got it right.....

....or wrong?





bre



bre

Focus of POE

- POE is a recognised process of providing structured feedback on project performance throughout a buildings lifecycle
- Review of the process of delivering the project up to and post handover
- Evaluation of the performance of the building in use (technical, functional, social, economic) during occupation
- Lessons learned and shared

Some history

- Origins in 1960s
- RIBA Plan of work 1962 included Stage M: Feedback
 - Inspection of completed buildings as 'way of improving service to future clients'
- 'POE where are you?' *Ian Cooper in Building Research and information 2001*
- Increasing interest with development of tools and guidance

Adding value to FE/HE projects: Building level

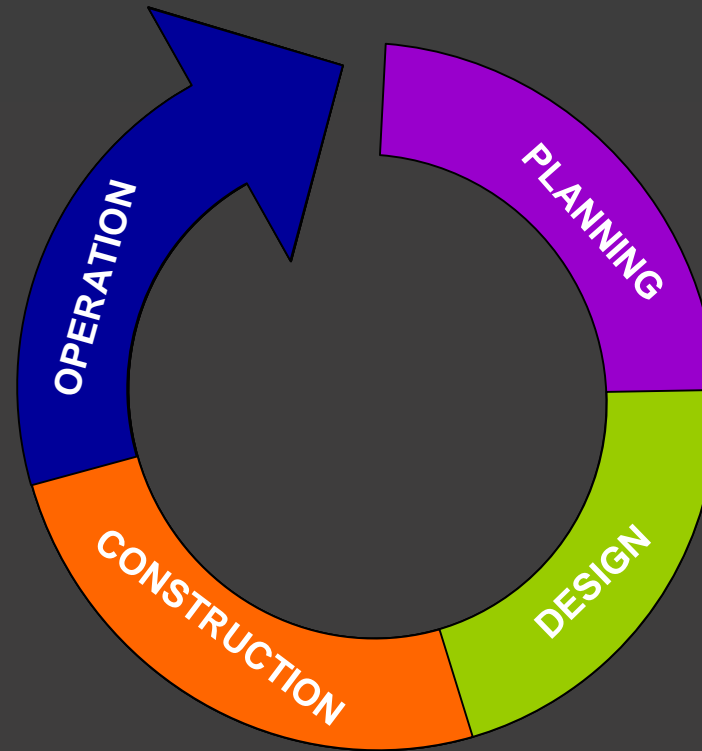
- Identifying and addressing existing performance issues
- Responding to users needs
- Reference to original business objectives and addressing changing institutional needs over time
- Monitor understanding of building operators
- Providing feedback on occupant behaviour

Adding value to FE/HE projects: Sector level

- Demonstrating the benefits conferred through improvements to the estate eg education delivery, improved efficiencies
- Learning and sharing lessons that can be used to improve the process and design on future construction projects
- Improving building procurement to provide better value for money
- Encouraging best practice
- Informing the future funding decision making process

Virtuous circle of continuous improvement

Continuous improvement: feedback throughout a building's lifecycle



Links to sustainability

- ‘Sustainability begins with what finding out what people need and want and providing it’
- BREEAM Education credits
 - Stakeholder consultation
 - Design Quality Indicator including In-use stage (POE)
- Are ‘sustainable buildings’ performing any better?

The SFC and Post Occupancy Evaluation

- POE mandatory for all SFC projects over £3 million since 2008
- Two related projects undertaken by BRE for the SFC
- ‘POE of Sustainable Development Projects’ 2008-10
 - Post Occupancy Evaluations of 4 key development projects: 3 sustainable developments and 1 standard new build
 - Pilot the SFC Post Occupancy Evaluation Guidance
- ‘POE of college capital projects’ 2009-13
 - 11 capital projects at 9 institutions
- Training and dissemination

Projects: Aims and objectives

- To promote POE as an essential best practice performance management and continuous improvement tool
- To identify areas of improvement and efficiency that can be measured and recorded, that can influence future decision making
- To allow lessons learned to be disseminated to enable the sector to self improve and ensure value for money
- To capture information on delivery and performance of the sustainable elements of the projects

Methodology

- Based on SFC/HEFCE POE Guidance
- Three stages
 - Operational Review: 6-12 months post handover
 - Functional Reviews: 12-18 months post handover
 - Strategic Reviews: 3 – 5 years post handover
- Focus on
 - Process: Post project Review
 - Product: Building in use

Our approach

- SFC guidance not prescriptive - methodology chosen to suit needs of project and stages
- Variety of techniques to build up an all-round picture and eliminate bias
- Independence
- Involving a wide range of stakeholders eg
 - *Academic, operational and administrative staff and students*
 - *Consultants and contractors*
 - *Estates departments*
- Building good relationships to ensure buy-in
- Flexibility in programme to meet needs e.g. exams, holidays
- Understanding of unique issues and sensitivities

POE techniques

- Observational walk rounds
- Financial analysis
- Energy, water and sustainability audits
- BREEAM assessments
- Design Quality Method
- Occupant consultation: Questionnaires, workshops, focus groups and interviews

Where we are now

Operational Review

- QMU
- Dumfries and Galloway
- North Glasgow College
- Jewel and Esk College
- Borders College, Hawick Campus



Functional Performance Review

- Cumbernauld College
- Carnegie College
- John Wheatley College
- QMU
- Cardonald College
- South Lanarkshire College

Forthcoming assessments



FPR, OR and SR

- Anniesland
- Borders Netherdale
- Jewel and Esk
- Langside
- Motherwell



Strategic Review

- Cumbernauld College
- Carnegie College
- John Wheatley College
- QMU
- Cardonald College
- South Lanarkshire College
- Dumfries and Galloway
- North Glasgow College
- Jewel and Esk College
- Borders College, Hawick Campus

POE case studies



Facilitated discussions

- 3 groups, 45 minutes plus 15 minutes feedback
- Sharing lessons from HE/FE projects
 - What went well and what didn't go so well
 - What you would do differently next time
- Topics
 - Project Management
 - Technologies
 - Operation / maintenance
 - Procurement
- 1 key lesson from each topic to feedback on