POST OCCUPANCY EVALUATION (POE) GUIDE

Introduction

Schoolcraft College's Academic Quality Improvement Program (AQIP) for 2012-2013 had an Action Project "Establish continuous planning standards and space analysis and utilization metrics." A component of that project was to develop "…a Post-Occupancy Evaluation (POE) process and implemented it for the first time in Fall 2013."

The AQIP Action Project went on further to say…

The purpose for a Post-Occupancy Evaluation or POE as explained by Building Owners and Managers Institute (BOMI) is to focus "…on how well a project fulfills the needs of its occupants. It provides insight into the consequences of decisions made during the course of a project and forms a sound basis for creating better projects and facilities in the future."

A properly conducted POE should complement the project programming efforts. Programming is a predictive means used to define project requirements and POE is a means for evaluating how well-established requirements have been achieved.

Construction & Design will conduct POEs with primary end users 3 to 12-months **[since shortened to 1-1/2 to 3 weeks after occupancy with exception]** after occupancy and use of changed spaces. POEs will focus on three feedback categories: Start-up Issues; Captured Design Objectives; and Uncaptured Design Objectives. A POE Report will be distributed to design team members for addressing Start-up Issues and continuous design process improvement.

What POE Aims to Address

A. **START-UP ISSUES (SUI)**

This POE category involves:

1. Issues disrupting occupants' usage of spaces that are in need of immediate problem solving to remedy. Examples: electrical power service disruptions; lighting fixture out of order; acoustical issues; or space temperature issues.

2. Action items to troubleshoot and attempt to resolve unforeseen problems between how changed spaces were designed and how they are actually being used.

3. Identifying the need for further adjusting / fine-tuning of building systems and/or space technology.

B. **CAPTURED DESIGN OBJECTIVES (CDO)**

This POE category involves:

1. Identification and documentation of design objectives that, from the end user's perspective, are addressed as intended / envisioned at time of Programming.

2. Citing items found to be ideal for the space application from the end user's perspective. Items that should be considered Schoolcraft College standard products.

C. **UNCAPTURED DESIGN OBJECTIVES (UDO)**

This POE category involves:

1. Identification and documentation of design objectives that, from the end user's perspective, are not addressed as intended / envisioned at time of Programming.

2. Citing items that do not meet the original intent for the space application from the end user's perspective. Items that should be re-evaluated with regards to use on future construction/renovation projects.

3. Assessment and documentation of work quality issues.

4. Citing items uncaptured by original space programming that could have otherwise allowed the space to fully function as end users intended.

Conducting the POE Meeting (2022 update)

POE MEETING TIMING – Typical to schedule 1-1/2 to 3 weeks following occupancy. For industry 3 to 12 months is typical, but worst-case DCD Project Managers should not defer POE Meetings beyond 3 months.

PROGRAM INTENTION FINDINGS – Equivalent of Start Up Issues (SUI). Capture programming items that require further adjustments to fulfill core intention. This prompts corrective measures under current project. **Action: Correct as part of Project.**

FUTURE IMPROVEMENT FINDINGS – Equivalent of Uncaptured Design Objectives (UDO). Designers capture end user's feedback on gaps between programming intention (approved design) and outcome (how end users would have done things differently now). That data is then used to improve future project outcomes by reemploying design aspects having favorable results, while avoiding repeat of less desirable ones. **Action: Documenting hindsight (only).**

POST OCCUPANCY DESIGN CHANGES FINDINGS – This category was not part of the original protocol. Requested adds, deletions, and/or modifications at POE stage without specific project budget allocations. **Action: End users submit new, self-funded DCD Work Request.**

RECORDING THE MEETING – Program Intention Findings (aka Start Up Issues (SUI)) are to be compiled on DCD spreadsheet template (shown below). "CORE ITEMS" are those applicable to many projects. "Scan Entire Project" means determine the need to record deleting if unapplicable.

DATE:				NOTE: Do not hide lines or colorize. Filter on columns for different viewing options.	
SC PROJECT:					
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ITEM #	LOCATION	TRADE	POST-OCCUPANCY EVALUATION (POE) ITEM	HANDLER	PENDING, START, WORK IN PROGRESS, COMPLETE
1	Scan Entire Project	Construction & Design	CORE ITEM: As-built architectural work.		
2	Scan Entire Project	Construction & Design	CORE ITEM: As-built FF&E work.		
3	Scan Entire Project	Construction & Design	CORE ITEM: As-built HVAC work.		
4	Scan Entire Project	Construction & Design	CORE ITEM: As-built electrical work.		
5	Scan Entire Project	Construction & Design	CORE ITEM: As-built technology systems.	JP	
6	Scan Entire Project	Construction & Design	CORE ITEM: Arrange for updates to Active Directory (aka Outlook Address Book).	KG	
7	Scan Entire Project	Construction & Design	CORE ITEM: Colleague Updates.	JP	
8	Scan Entire Project	Construction & Design	CORE ITEM: Space Inventory Spreadsheet Updates.	CS	
9	Scan Entire Project	Construction & Design	CORE ITEM: Mainsaver Updates.		
10	Scan Entire Project	Construction & Design	CORE ITEM: Corridor Maps updates.	JU	
11	Scan Entire Project	Construction & Design	CORE ITEM: GIS Data Updates.	JU	
12	Scan Entire Project	Construction & Design	CORE ITEM: Door Number Changes shared with Campus Police.	CS	
13	Scan Entire Project	Construction & Design	CORE ITEM: Data Network Location (LOC) Changes (add, modifications, deletions) shared with SCIT Networking Team.		
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35	TOTAL # OF ITEMS				

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