

CENTER FOR THE BUILT ENVIRONMENT (CBE)

OCCUPANT INDOOR ENVIRONMENTAL QUALITY (IEQ) SURVEY

SURVEY IMPLEMENTATION

CONTACT INFO

For technical support or questions about the survey, please contact us at:

email: cbe-survey@berkeley.edu
phone: (510) 643-4984
web: <http://www.cbesurvey.org>

SURVEY TIMELINE

Action	Date
Notify CBE team of desire to implement survey	At least two weeks prior to survey start
Provide CBE with necessary info (see items 1-5 in list below)	At least two week prior to survey start
Send invitation to respondents (see guidelines on page 4)	Morning of survey start date
Duration of survey	Typically two weeks
Receive online individual building report	Typically two weeks after survey has ended (and completed building characteristics form has been received by CBE – see item 6 in list below)

INFORMATION TO PROVIDE TO CBE

1. The text for the Welcome page, which briefly describes the purpose of the survey and notes the sponsoring organization(s). See sample provided on page 2.
2. Number of floors in the building to be surveyed.
3. If you would like respondents to indicate which agency, department or organization they work for, please provide the names of the agencies, organizations or departments. We will include these responses in a question, “Which organization [agency, department] do you work for?”
4. If you do not want to use North/East/South/West as location descriptions, please provide the descriptions you’d like and/or a simple line drawing of the building’s floor plan in .jpg or .gif format. See sample provided on page 3.
5. Building features that you would be interested to ask the occupants about. A list of possible features you can obtain feedback about through the survey can be found on page 5.
6. The CBE survey administrator will send you a link to an online building characteristics form. This form must be completed before the report of survey results will be available for your building. Please see page 6 for more information.

WELCOME PAGE

Sample welcome page

The welcome page is the first page the respondent sees upon accessing the survey, and it explains who is conducting the survey, how long it will take, etc. To see a live example, please visit the link below, and click on “View the Online Survey Demo”:

<http://www.cbesurvey.org/>

Typical welcome page text is below. You may wish to tailor the text to the needs of your particular study. If you do wish to customize the welcome page, please send the updated text to the CBE survey administrator at least one week prior to the survey start date.

Welcome! [main page]

Thank you for your participation in this building evaluation study. This study is a joint effort between [Organization Name], and the Center for the Built Environment at the University of California, Berkeley.

Your feedback will provide valuable data that will be used to identify how successful your building is in meeting its design goals. Results will be presented to the building's owners, managers, design team, maintenance personnel and the Center for the Built Environment's research staff and membership.

Survey Details [sidebar]

Time. The survey usually takes less than 15 minutes to complete.

Confidentiality. Your answers are confidential. Survey responses will not be linked to an individual's identity.

Voluntary Participation. Your participation in this study is completely voluntary.

You are free to skip any questions that you don't want to answer and to end your participation in this survey at any time.

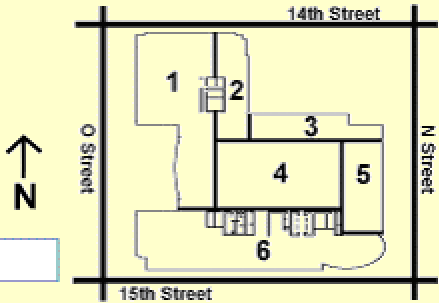
Your decision to fill out the survey or not will have no effect on your job or any benefits you receive now or in the future.

LOCATION DESCRIPTIONS

The core survey includes a question on the “Personal Workspace Location” page, “In which area of the building is your workspace located?” with responses: North, East, South, West. However, this question is not always the best fit for a building. You may wish to ask an alternate question in which the respondent can indicate the zone of the building in which they sit, and provide a floor plan schematic to help them find that zone. These zones are usually divided based on a characteristic such as perimeter/interior or some other design characteristic that is likely to affect the respondents’ environmental conditions. A sample of the zone question and an accompanying graphic is included below. If you do wish to use the zone question, please send the list of zones and a floor plan graphic to the CBE survey administrator at least two weeks prior to the survey start date.

Based on the drawing below, in what zone of the building is your workspace?

☐ 1
☐ 2
☐ 3
☐ 4
☐ 5
☐ 6
☐ Other:



The diagram shows a floor plan of a building bounded by O Street to the west, N Street to the east, 14th Street to the north, and 15th Street to the south. A north arrow points upwards. The building is divided into six numbered zones: Zone 1 is a small room in the northwest; Zone 2 is a small room in the north-central area; Zone 3 is a large room in the northeast; Zone 4 is a large room in the center; Zone 5 is a small room in the east-central area; and Zone 6 is a large room in the southwest.

Figure 1 – Sample floor plan diagram

Some tips on how to make a useful floor plan graphic:

- North directional. Purpose: for CBE to map zones to NSEW for benchmarking analysis.
- Zones must be clear and unambiguous. Every occupant should be able to determine precisely which zone they are in, from the graphic.
- Graphic should have clearly drawn interior landmarks (restrooms, conference rooms, major corridors, etc.) but should be free of extra, unnecessary information. It is not necessary to draw every cubicle, for example, and can make the graphic harder to read.
- Perimeter of building should show surrounding streets and street names, and/or other outside landmarks (lakes, parking lots, etc.) to help with orientation.
- Zones must be sufficiently large such that there are at least 15 occupants in each zone on each floor. If that number does not match the scale of the space then a minimum of 10 is acceptable. Results are presented in aggregate, and fewer occupants per zone could make it possible to identify individual occupants.
- The width of the image should not exceed 600 pixels.
- Graphic and fonts should be crisp, easy to read, and aesthetically pleasing. CBE can help with this.

INVITING PARTICIPANTS

Sending the invitation

We recommend sending the introductory message for the survey *directly* (i.e., not forwarded) from an individual who is well known, respected and a decision maker in the organization. This conveys management support for the survey and can have a significant effect on the response rate.

We've found that the introductory email for the survey with the lowest response rate was poorly executed; it was forwarded three times before it reached the occupant, each time with an additional header attached. By the time it arrived to the intended recipients, the reader needed to scroll to the bottom of the message to read the original text. This diminished the perceived importance of the study and is likely to have contributed to the low response rate. The study with the highest response rate was introduced with an email sent directly from the head of the organization noting an "important survey" for all building occupants.

The invitation should be sent to the recipients on the morning of the survey start date.

Example invitation

Dear Occupants:

[Organization Name] is using an innovative on-line survey developed by the Center for the Built Environment at the University of California, Berkeley to evaluate your satisfaction with our building and identify how to improve our facility services.

Your participation is very important. Please visit this web address before [date]:
[link]

This survey gives you an opportunity to comment on your satisfaction with spatial layout, office furnishings, office temperature, air quality, lighting, acoustic quality, building maintenance, and the building overall.

The survey takes less than 15 minutes to complete and is confidential and anonymous. The results will greatly assist us in making this facility work for you.

If you have questions about the survey or experience any technical difficulties, please contact CBE via e-mail at cbe-survey@berkeley.edu or by phone at (510) 643-4984.




Thank you in advance for your participation.

BUILDING FEATURES

The building(s) you survey may have specialized features about which you wish to gather occupant feedback. A sample of the building feature question is included below along with a list of possible building features installed or operating in the building. Please note that not all the building features listed might be relevant to the building being surveyed. To keep the survey as concise as possible (and therefore minimize the impact long surveys can have on completion rates), we suggest that you choose no more than four building features from this list. This list is not exhaustive and you can add your own items.

For each of the building features listed below, please indicate how satisfied you are with the effectiveness of that feature:

Roller blinds

Very Satisfied    Very Dissatisfied

☐ I have no experience with it

Comments:

Figure 2 – Sample building feature question

- Operable windows
- Floor air vents [or other types of controllable diffusers]
- Thermostats
- Light switches [of a special kind]
- Automatic daylight controls
- Occupancy sensors for lighting
- Window blinds
- Roller shades
- Exterior shades
- Movable workstations
- Adjustable furniture
- Recycling systems
- Automatic faucets
- Low-flow sinks
- Low-flow toilets
- Composting toilets
- Waterless urinals
- Private meeting rooms
- Skip-stop elevators
- Security system

BUILDING CHARACTERISTICS FORM

Purpose

Before posting results for a building that has completed the survey, CBE requires that survey clients fill out a building characteristics form completely about the building. The purpose of the form is to collect information about the design features of the buildings that we survey. This allows us to analyze survey data and explore trends based on building characteristics.

Survey data populates CBE's post-occupancy survey database. This database furthers CBE's research by facilitating analysis of the survey results to assess occupant perception of the work environment and determine what correlation, if any, exists between self-reported satisfaction levels and the building technologies employed in these buildings. Comparing the data from these surveys against the benchmark of existing survey data enables CBE to advance its research of the efficacy of various building technologies, and furthers the building industry's understanding of post-occupancy evaluation techniques.

Accessing the Form

A sample of the building characteristics form can be found at:

<http://www.cbesurvey.org/bldgchar>

User name: sample

Password: sample

CBE will send you your own login information that will give you access to the forms for your buildings.