

BEST PRACTICES

RETURN POLICY

DON'T JUST HAND OVER THE KEYS TO A PROJECT. THE POST-OCCUPANCY REVIEW IS A CRITICAL NEXT STEP THAT SHOULD BE PART OF YOUR FIRM'S OVERALL BUSINESS STRATEGY.



Text by **Elizabeth Evitts Dickinson**
Illustrations by **Peter Arkle**

IN AN ERA of swiftly morphing building technology, when clients want high-performance buildings and spaces that foster the performance of users, the post-occupancy evaluation (POE) has re-emerged as a valuable tool. POEs allow firms to ascertain the success of design decisions. And they can also offer clients insights on how best to use their new or renovated space.

The challenges of integrating POEs into business operations, however, keep many firms from pursuing this service. It can be seen as time consuming, expensive, and difficult to defend to a client. As Janice Barnes, AIA, of Perkins+Will says: "How do you help a client realize that this is important without looking vulnerable, like you don't know what you're doing?"

Here, we've gathered tips from experts on making POEs a win for you—and your clients.

BARNES, WHO HAS Ph.D.s in both architecture and business, says the key to successful post-occupancy is pre-occupancy research. "In order for the [POE] data that you're collecting to give you valid results, you have to first measure the problem you're solving, then design to solve that problem, and finally see if you have solved it," she says. "It's collecting data pre- and post-occupancy. That's why [at our firm] we call it a PPOE instead of a POE." Barnes suggests a four-step approach:

1. Make sure it's a priority. "Does your firm have a mindset that this is important? Because if not, it will always be pushed to the side," she says.

2. Don't reinvent the wheel every time. Invest once in developing a consistent protocol that includes a diverse set of tools for research and evaluation, such as focus groups, interviews, surveys, and on-site visits.
3. Refine your standard protocol for specific industries. If you work in K-12, for example, consider the issues that consistently arise in that typology (educating staff about systems operations, say) and build necessary research into the process.
4. Get the protocol evaluated. Perkins+Will established its standardized PPOE and then vetted it through a research university. "What you want is something that is rigorous and replicable," she says. "From there, you can scale the service up or down depending on budget, so maybe it's two focus groups instead of 20."

Also, remember to keep your tools varied. "Go beyond a survey, which only gives you a limited snapshot," Barnes says. Perkins+Will employs numerous tactics, including something they've dubbed "the Vinny interview," where they talk to maintenance staff, doormen, etc. "These are the people who always know what's really going on in the building," Barnes says.

HOUSTON-BASED, healthcare expert FKP Architects offers no-charge post-occupancy evaluations as a standard service. Indeed, POEs are built into the firm's annual operating budget.

The value, says senior vice president and senior consultant Beverly Dorney, who is a registered nurse, is to assess what's working. "We start by being clear on the building's goals, and the POE tells us how the building actually



JANICE BARNES, AIA
PRINCIPAL AND GLOBAL DISCIPLINE
LEADER FOR PLANNING + STRATEGIES,
PERKINS+WILL



BEVERLY DORNEY
SENIOR VICE PRESIDENT AND
SENIOR CONSULTANT,
FKP ARCHITECTS



GARY OWENS, AIA
SENIOR PRINCIPAL AND
SENIOR PROJECT DESIGNER,
FKP ARCHITECTS



JANIKA MCFEELY, ASSOC. AIA
ASSOCIATE AND SUSTAINABILITY SPECIALIST,
EHDD

performs compared to what we expected. This helps us support a client's operational goals."

Dorney recommends POE interviews that solicit a broad range of respondents, from nurses and families to housekeepers. She also suggests shadow interviews. "I call these a 'walk and talk,' where we follow a person for a day and capture work as it's happening. That triggers useful insights."

The evaluations can instruct better design choices, but just as often, they offer the client worthwhile data. "The POE enlightens our

clients on what they said they were going to do and what actually works," says senior principal and senior project designer Gary Owens, AIA.

Owens advises firms to put together a nonpartisan team that was not involved in the day-to-day design of the project and to inform that team's members of the building's original objective. Using a template of POE tools, conduct the evaluation 12 to 24 months out for healthcare facilities (Perkins+Will's Barnes suggests waiting at least three months in other building types, to let the users settle in), and

remember that scheduling takes time. "Patience is required to get into the facility. Clients are busy," Owens says.

MEASURING HOW BUILDINGS function is a given at San Francisco's EHDD: The firm focuses on high-performance design, like its net-zero Packard Foundation Headquarters in Los Altos, Calif. EHDD uses the services of the Center for the Built Environment (CBE) in Berkeley, Calif., to help with post-occupancy studies. "We give CBE the basics on the building and they do the rest," says associate and sustainability specialist Janika McFeely, Assoc. AIA.

CBE also helps put post-occupancy feedback into perspective. "They have a database of different projects and you can compare the results with similar buildings," McFeely says.

For example, low scores on acoustic values may be consistent within a certain typology or related to things like the prevalence of open-plan layouts. Or that passive energy systems may make less background noise. "We learned to use white noise machines in certain contexts," McFeely says.

POEs are particularly useful in high-tech buildings where user error can compromise daily comfort. "In one survey, there was bad thermal comfort, and the results showed that staff members didn't know to adjust the underfloor air system at their workstations," she says. "It's rarely the technology and often the operation of it."

Which is why EHDD is developing a service package to help clients use their building over the first year. McFeely suggests that the business model of architecture should adapt to accommodate this.

"The idea that a building is done when it's done is a problem throughout the industry," she says. "We're learning that we can't just turn over the building and say: 'OK you're ready to go!' We have to make sure that everyone is aware of how it operates. It's time to create enhanced commissioning services after construction and create an ongoing relationship."