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## EP4600 – PROCEDURE FOR COMPLETING POST OCCUPANCY EVALUATIONS

### 1.0 DEFINITION AND SCOPE OF PROCEDURE

- 1.1 Post Occupancy Evaluation (POE) is a structured review process that provides information that encourages better design and implementation of future projects by identifying the strengths and weaknesses of a completed project through experience and reflection.
- 1.2 HEFCE and AUDE have produced a “Guide to Post Occupancy Evaluation” for the HE sector and, with it, a toolkit that enables the POE reviews to be available and of use to not only the reviewing institution but the sector as a whole. The guidance and toolkit are not prescriptive in the format or mechanics of the POE, thereby providing a framework by which an institution has the ability to mix and match the basic elements of a POE to meet its own needs, but also provide information useful for other Universities. Further details can be obtained by downloading a copy of the guide from the HEFCE website:  
<https://www.aude.ac.uk/resources/buildings/post-occupancy-evaluation/>
- 1.3 The Estates and Facilities Management Division (EFMD) is to carry out Post Occupancy Evaluations (POE) on all capital projects over £750,000 net construction cost in accordance with the HEFCE & AUDE guidance covering the ‘Project’ review elements but with some modifications. The required outputs are a report and abstract setting out a Project description, the analysis and methodologies used and the findings. The evaluation should conclude with details of the lessons learned and recommendations for improvement.
- 1.4 The timing of these review elements should be undertaken approximately 12-18 months after occupation and, if possible, again at 3 years post occupation
- 1.5 With any project that has a BREEAM assessment, the post completion management data collated by the Maintenance Team shall be incorporated into the POE review in the appropriate element of both reviews.
- 1.6 The Project Manager is to ensure that there is a final meeting of the Project Task Group (PTG) whereby the management and oversight of the project is discussed. The feedback from members, to include both good practice identified throughout the project and lessons learnt, should be collated and included in both revised project management procedures and the POE report.
- 1.7 It is the responsibility of the Project Manager to ensure that the procedure is implemented and followed on any project.
- 1.8 As no two projects are alike, the selection of the elements within each category, and the methodology to be used for the assessment, are to be defined by the Project Manager using table J in the HEFCE guide.

## 2.0 PROCEDURE

- 2.1 The Project Manager, as soon as practicable, once the scope of the Capital project is defined, is to develop the brief for the POE, using the HEFCE& AUDE guide suitable for the particulars of the project. There are templates in the guidance documents which can be used or modified to assist with this and EP4570 and associated forms should be used for the Consultant Evaluations
- 2.2 The Project review elements to be covered are included in three categories; Project Delivery, Functional (Building) Performance, and Consultant Performance. Within these categories the following are listed for assessment:
- Project Delivery
    - Design brief procurement
    - Design development
    - Commissioning/occupation
    - Cost Management
    - Project Management
    - Performance of consultant team and contractor
  - Functional (Building) Performance
    - Aesthetics/image
    - Space (size, flexibility, utilization)
    - Environment (comfort)
    - Facilities Management (maintenance, cleaning, security)
    - Sustainability/energy performance
  - Consultant Performance
    - Understanding of University's requirements
    - Flexibility and responsiveness to change
    - Management and communication
    - Deliverables
- 2.3 The Project Manager is to appoint a POE professional to undertake and facilitate the production of the reports to agreed timescales, using as necessary the University framework for the appointment of consultants, and following the current financial regulations.
- 2.4 The Project Manager is to request all those to be consulted to co-operate with the appointed POE professional and duties in respect of the delivery of the POE should be written into the standard Consultants' Agreement.
- 2.5 The Project Manager is to issue the report to the Estates Senior Management Team, and undertake any recommendations as directed. A presentation should also be given to the joint Development & Maintenance Team Meeting to share lessons learned.

*Procedure ends*