

Effective Post-Occupancy EVALUATIONS

The work doesn't stop when the project is completed. A targeted analysis of how people use the spaces can provide actionable data for clients and designers.

Post-occupancy evaluations (POEs) can be a valuable tool for facility managers, education leaders and project owners, providing a road map for what worked and what didn't. The information can be used to guide future investments, educate users and ensure that the environments are being employed to their full potential.

But POEs only work if they are structured to efficiently produce actionable data that can be considered in the context of the project's larger goals. Far too often, POEs are seen as too complicated, time consuming or expensive. Or worse, the analysis isn't structured to produce the type of results that provide a return-on-investment.

"We want to learn what design strategies should be repeated in future projects, what space use training may be needed and what to design differently in future projects," says Kimari Phillips, LPA's research manager.



LEFT: Menchaca Elementary School

LPA's research team has been working with clients in recent years to hone the process and focus on developing results that provide value to the entire design team. In some cases, the data has illustrated that spaces were not used as intended or were used in surprising ways; other studies found design strategies worked effectively and could be employed in future projects.

For example, a recent post-occupancy evaluation of Menchaca Elementary School in Austin, Texas, found that outdoor spaces were being used effectively for nature-based play, creativity and student exploration; students and teachers appreciated access to daylight; and corners, nooks and small group rooms were providing restorative opportunities for students. But the study also found that, in some spaces, acoustics could be improved, furniture could be better deployed to take advantage of the spaces, and more individual seating was needed in some areas.

"The results will help Austin Independent School District make informed design decisions on future campuses and support educators as they grow more accustomed to using their new facility," says LPA research analyst Rachel Nasland.

In the POE process, several strategies can help address concerns about complexity and expense, LPA researchers say.

- Start small; some data collection is better than none
- Set measurable project goals early, and assess after occupancy
- Execute and analyze within a realistic time frame
- Integrate the POE into basic scope of services
- Only assess what you have the resources to act on

LPA's research team focuses their POE process on the project's original design goals and a variety of data collection methods. On every project, the design teams establish specific goals around performance, experience, wellness and community, providing a clear guide for the post-occupancy evaluation. The research team partners with clients to assess how occupants are using and experiencing their spaces and how spaces are performing related to design goals.

Each project is different. To ensure the process yields usable findings, the mix of data collected depends on the project team's questions.

"We're always trying to ask deeper questions to produce creative and impactful solutions," Phillips says.

Transparency is a big part of the process. The results should be easily shared and communicated to everyone involved. If developed effectively, the reports can help guide training to empower occupants to use the spaces as intended, optimize the user experience and increase accountability for performance by the owner-occupier and design teams. In addition, future decisions can be based on the data, leading to cost and time savings and a measurable return-on-investment. 📊

A SCALABLE POE PROCESS

- 1 SITE TOUR + OBSERVATIONAL STUDY**
During a client-guided or independent site tour, the research team observes the spaces and determines patterns of when and how they are used throughout the day.
- 2 SURVEYS**
Online questionnaire issued to understand user experience and satisfaction ratings of design and sustainability features.
- 3 INTERVIEWS**
Research team meets separately with small, representative groups of users to understand how the design is functioning and whether and how it is supporting organizational and sustainability goals.
- 4 ENERGY + WATER USE DATA**
Utility bills are collected to analyze energy and water use intensity. The research team compares actual to predicted EUI/WUI and benchmark data.
- 5 DELIVERABLE**
A summary report is delivered to share the key takeaways from POE data collected.



Developed through LPARED—LPA Research, Education and Design—the firm's in-house research group.