

Office Accommodation Management Framework

Guideline 4: Occupancy

Practice note

Undertaking a post-occupancy review of office accommodation projects





Contents

1.0	Introduction	1
2.0	Purpose	1
3.0	Scope	1
4.0	Definition	1
5.0	Post-occupancy review types	1
5.2	Focus	2
6.0	Phases, procedures and activities	2
6.1	Phases and procedures	2
6.2	Activities	4
7.0	Timing	5
8.0	Rating systems	5
9.0	Benefits	6
10.0	Related documents	6
11.0	Additional information	6
Appendix 1		7
Template 1: Occupant survey of physical project outcomes		
Appendix 2		8
Template 2: Occupant survey of functional project outcomes		
Appendix 3		9
Template 3: Occupant survey of project process		



1.0 Introduction

This practice note forms part of the Office Accommodation Management Framework (OAMF) suite of documents. The OAMF integrates policies, processes, activities and guidelines for government agencies in relation to establishing office accommodation needs, acquiring and fitting out suitable space, utilising that space effectively and managing the accommodation-change process.

The post-occupancy review process is a powerful tool with the potential to achieve several benefits. The process evaluates the outcome for a specific project, identifies any remedial work required, provides information to support continuous improvement for future projects and can be an important part of the communication process for change management.

2.0 Purpose

The purpose of this practice note is to provide advice to agencies to assist them in undertaking post-occupancy reviews of office accommodation projects.

3.0 Scope

This practice note is recommended for use by government agencies when undertaking a post-occupancy review of office accommodation projects. Sample templates are included for basic (indicative) occupant surveys. These templates may be modified as required to suit particular applications. In addition, advice is provided to assist agencies in undertaking more extensive post-occupancy reviews, including investigative and diagnostic reviews.

Further advice and services are available from the Department of Housing and Public Works (HPW).

4.0 Definition

Post-occupancy review is the process used to measure a project's success and focuses on the needs of the occupants. Post-occupancy review measures:

- the extent to which the project's outcome meets the occupants' expectations in relation to the physical workplace environment and the functionality of the design
- the effectiveness of the design, construction, communication and occupancy process.

5.0 Post-occupancy review types

5.1 Types

Post-occupancy reviews can be conducted with varying levels of complexity. More complex reviews require more time and resources than those of a more simple nature. Three general types of post-occupancy review, in increasing order of complexity level are:

- **Indicative.** Indicative post-occupancy reviews provide information on significant successes and problems and can be as simple as a walk-through evaluation. Selected interviews can also be included as part of the walk-through, or separately. Generally, indicative post-occupancy reviews involve simple surveys of occupants to establish their views on the physical project outcome, and in some cases, the project process.

- **Investigative.** Investigative post-occupancy reviews are more detailed and require formal data collection techniques. Interviews need to be structured and unambiguous. More time and resources are required for this type of review than for an indicative review. Standard questionnaires can be used to survey respondents or customised questionnaires can be prepared. Structured interviews and recording of responses can also be included for analysis together with responses to questionnaires. Investigative post-occupancy reviews can be used for detailed evaluation of both the physical project outcome and the project process.
- **Diagnostic.** Diagnostic post-occupancy reviews are more detailed than both of the previous types. These reviews are comprehensive and generally initiated for large-scale project reviews, or when serious problems have developed or when the review is part of a rigorous research project. Diagnostic post-occupancy reviews require expert advice and management. The scope of these types of post-occupancy reviews can be designed to encompass all aspects of projects according to needs.

5.2 Focus

Post-occupancy reviews of the *physical* and *functional* project outcome for the workplace generally limit surveys to the occupants. However, when new work patterns are being introduced in conjunction with a new fitout project, input from agencies' senior executives may also be useful. The data collected from surveys of occupants are the subjective opinions of the occupants, placed into the context of the particular rating system used.

Post-occupancy reviews of the project *process* focus on the strategies, process and procedures involved in office accommodation projects. These aspects can include the communication process, achievement of milestones, quality of documentation and project coordination. Post-occupancy reviews undertaken to measure the effectiveness of the project process can be wide and include responses from occupants, the agency's project team and agencies' senior executives. Input from the project consultants' perspective can also be constructive.

A technical post-occupancy review also can be undertaken to compare the actual (objective) performance of building services with the design performance. These reviews can evaluate workplace environmental conditions such as temperature, humidity, lighting levels and acoustics but require expert advice and special equipment. The Department of Housing and Public Works will provide further information and services in relation to these technical reviews if required.

6.0 Phases, procedures and activities

6.1 Phases and procedures

The three phases and associated procedures for each type of post-occupancy reviews are:

1. Planning:

- Feasibility
- Resource planning
- Research planning

2. Conducting:

- Advance notice and instructions to respondents
- Managing the data collection process
- Analysing the data

3. Applying:

- Reporting outcomes
- Recommendations
- Review

Each procedure involves a number of activities.

Phase	Procedures	Activities
Planning	Feasibility	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
	Resource planning	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
	Research planning	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Conducting	Advance notice/instructions	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
	Managing data collection	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
	Data analysis	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Applying	Reporting outcomes	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
	Recommendations	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
	Review	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

The post-occupancy process model is shown diagrammatically in figure 1.



Figure 1

6.2 Activities

Examples of typical activities involved in the above post-occupancy review procedures are shown in the table below.

Procedure	Activity
Feasibility	<ul style="list-style-type: none"> Establish target group's structure. Establish principal contact. Discussion/selection of post-occupancy review type. Identify project team. Inspect accommodation to be reviewed. Establish availability of project documentation. Undertake preliminary interview with key personnel. Establish post-occupancy review time and cost budgets. Obtain project approval.
Resource planning	<ul style="list-style-type: none"> Obtain resource commitment for participants Define roles and responsibilities. Develop workplan and milestones. Present workplan to stakeholders and obtain agreement Establish project team and meeting schedules. Establish reporting structure.
Research planning	<ul style="list-style-type: none"> Obtain previous post-occupancy reviews for reference. Obtain relevant project documentation. Formally notify contacts and respondents of project. Establish technical equipment needs. Obtain authorization for photographs, samples and measurements Undertake project team inspection of accommodation Identify and commission specialist consultants. Establish data analysis methodology. Establish report format and distribution. Establish key performance indicators
Advance notice/instructions	<ul style="list-style-type: none"> Coordinate post-occupancy review with building owner and occupants. Conduct project team briefings. Conduct occupant information sessions. Set parameters/rating system for observations and interviews Set up project team accommodation. Prepare data collection forms and ratings systems. Obtain and calibrate technical equipment.
Managing data collection	<ul style="list-style-type: none"> Liaise with occupant's contact person. Distribute data collection forms with instructions. Collect completed forms and collate. Confirm process is valid. Document process.
Data analysis	<ul style="list-style-type: none"> Undertake preliminary review of responses. Separate out obviously invalid responses for follow up. Enter data into assessment system. Process data and print results. Present results in suitable formats, charts, etc. Interpret results. Prepare preliminary report.

Reporting outcomes	<p>Convene meetings with stakeholders.</p> <p>Present preliminary report. Revise if necessary.</p> <p>Establish presentation format and content for distribution.</p> <p>Arrange for report printing and presentation media</p> <p>Distribute reports to executive and key personnel.</p> <p>Present results to occupants.</p> <p>Present results to executive and consultants if applicable</p>
Recommendations	<p>Obtain occupants' comments.</p> <p>Review survey findings and comments.</p> <p>Confirm correlations.</p> <p>Identify areas for improvement.</p> <p>Develop strategies for improvement.</p> <p>Prioritise and make recommendations.</p> <p>Submit draft recommendations to key personnel for comment</p> <p>Distribute recommendations to stakeholders.</p>
Monitoring and review	<p>Consult with occupants/client/executive.</p> <p>Prepare and distribute strategies for improvement.</p> <p>Develop action plan and responsibilities.</p> <p>Monitor implementation of strategies.</p> <p>File/archive results and reports for future reference.</p>

7.0 Timing

Typically, a post-occupancy review should be carried out between three and six months after the completion of the project to allow occupants to become accustomed to the new surroundings and potentially new ways of working, and avoiding comments that could be premature. In some cases, it may be appropriate to carry out a follow-up review to confirm the original responses or to establish if perceptions have changed as the occupants become more familiar (and potentially more satisfied) with the accommodation.

8.0 Rating systems

For post-occupancy reviews to be useful, a rating system is needed to measure satisfaction levels. Rating systems vary in complexity and generally require the survey respondent to make a choice, between or among, a number of satisfaction indicators such as:

- satisfactory or unsatisfactory, rated as 1 or 0 respectively
- good, acceptable or poor, rated as 3, 2 and 1 respectively
- excellent, very good, good, fair, and poor, rated from 5 to 1 respectively.

More rating levels than 5 normally are not useful because respondents generally cannot accurately make such fine distinctions.

Other descriptive indicators can be used if more appropriate to the review. Satisfaction indicators should be clear and unambiguous.

Post-occupancy review rating systems that use a total numerical score or percentage to represent the overall results of a review are generally not useful because of the possibility that high scores for less important factors could mask low scores in areas that occupants might consider to be very important. A profile of the review's results by separate category (or grouped into similar categories) can provide a better and more-detailed indication of the project's success than a single number or percentage.

Agencies are encouraged to seek advice from the Department of Housing and Public Works in relation to post-occupancy review planning, implementation and analysis.

9.0 Benefits

A thorough and structured analysis of the responses to a post-occupancy review can provide valuable lessons for future projects and contribute to continuous improvement in both the workplace environment and in the way office fitout projects are managed by both agencies and project consultants. In addition, the post-occupancy review becomes an inclusive process for occupants and is an important part of a project's communication strategy. Finally, the process identifies any issues for rectification, adjustment or refinement.

In the case of large projects, or projects which involve substantial changes to patterns of work, follow-up post-occupancy reviews are desirable and can incorporate additional evaluation criteria that can be used to measure the project's success in organisational and service delivery terms. For example, in addition to surveying occupants' satisfaction, productivity can be measured or observed, absenteeism can be measured, continuous improvement can be gauged and quality variances noted. Careful evaluation of these results is required, preferably involving expert advice, in order to establish the extent to which the workplace environment is influencing business outcomes.

10.0 Related documents

Additional information relevant to conducting office accommodation post-occupancy reviews is available in the guideline *Project Review*, which forms part of the *Capital Works Management Framework*, Department of Housing and Public Works, 2000, and in the guideline *Post-Occupancy Evaluation*, which forms part of the *Strategic Asset Management* guidelines, Department of Housing and Public Works, 2000.

11.0 Additional information

Additional information, assistance and advice is available from the Department of Housing and Public Works. Contact information is available from <http://www.hpw.qld.gov.au/aboutus/BusinessAreas/AccommodationOffice/Pages/Default.aspx>.

Appendix 1

Template 1: Occupant survey of physical project outcomes

Project name

Completion date Date of survey

Please respond to the following questions or statements by marking the box that most closely matches your rating of the physical conditions in the workplace, using the rating choices provided.

	Excellent	Very good	Good	Fair	Poor
1 Floors: Quality and appearance of the floor covering Comments:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2 Ceilings: Condition and appearance of the ceilings Comments:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3 Permanent building walls Condition and appearance Comments:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4 Partitions and screens: Extent and suitability (solid, glazed, heights, materials) Comments:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5 Lighting: Availability of natural light Comments:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6 Lighting: Level of artificial lighting provided Comments:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7 Lighting: Quality of lighting overall (for example: evenness, absence of glare) Comments:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8 Air Conditioning: Temperature Comments:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9 Air Conditioning: Ventilation and air movement Comments:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10 Acoustics: Noise from plant and equipment (nil = excellent, unacceptable = poor) Comments:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11 Acoustics: Noise from general office activities (not noticeable = excellent, disruptive = poor) Comments:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12 Acoustics: Speech intelligibility in face-to-face or telephone conversation Comments:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13 Furniture: Comfort and ergonomics Comments:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14 Furniture: Construction quality (fit of components, smoothness of operation and adjustment, etc) Comments:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15 Furniture: Finishes and fabrics (surfaces, colours, etc.) Comments:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16 Power: Number and location of power points Comments:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17 Data and Communications: Number, location and type of outlets and equipment provided Comments:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Accommodation Office, Department of Housing and Public Works, GPO Box 2457, Brisbane Qld 4001

Appendix 2

Template 2: Occupant survey of functional project outcomes

Project name

Completion date Date of survey

Please respond to the following questions or statements by marking the box that most closely matches your rating of the physical conditions in the workplace, using the rating choices provided.

	Excellent	Very good	Good	Fair	Poor
1 Space: Adequacy of your personal workspace (amount of space) Comments:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2 Space: Adequacy of space for support areas (number and size of meeting rooms, conference rooms, etc.) Comments:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Accommodation Office, Department of Housing and Public Works, GPO Box 2457, Brisbane Qld 4001

Appendix 3

Template 3: Occupant survey of project process

Project name

Completion date Date of survey

Please respond to the following questions or statements by marking the box that most closely matches your rating of the physical conditions in the workplace, using the rating choices provided.

	Excellent	Very good	Good	Fair	Poor
1 During the project initiation phase, I was kept adequately informed. Comments:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2 During the design phase, I was adequately informed and/or consulted. Comments:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3 During the design phase, my requests or concerns were addressed. Comments:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4 I was adequately briefed on the relocation arrangements to the new accommodation. Comments:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5 My personal effects, files and equipment were relocated, installed and operational on the first day of occupancy. Comments:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6 I received effective and appropriate communications and updates during the project. Comments:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7 Written and printed communication material was clear, concise and informative. Comments:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8 Any fitout or operational problems that I have experienced since initial occupancy have been dealt with effectively. Comments:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Accommodation Office, Department of Housing and Public Works, GPO Box 2457, Brisbane Qld 4001