

## **APPENDIX 02 - POST OCCUPANCY EVALUATION GUIDELINES**

### **A. Post Occupancy Evaluation Intent**

1. The intent of the Post Occupancy Evaluation (POE) is to assess a building's performance in terms of its physical built environment, by gathering feedback and analyzing the findings, after a building has been occupied for eleven months or more.
2. As indicated in the Owner-Architect Agreement, as part of the Eleventh Month Inspection the A/E shall provide to the Owner a written POE report of the Project. The A/E shall use the framework and process outlined herein as a guide to develop and complete a POE report.

### **B. Eligible Capital Projects**

1. A POE report is required for completed Capital Projects included in the Status of Significant Projects (SSP) report issued to the Board of Governors' Finance & Facilities Committee.

### **C. Post Occupancy Evaluation Process**

1. Online Survey: Participants, identified in section D., anonymously provide feedback on the design and performance of the building based on a consistent line of survey questioning.
2. In-person Interviews: Selected participants, from each category in section D.1. below, provides a detailed perspective on the outcome of the building based on the evaluation criteria.
3. Building Tour: Complete an interior and exterior walk-through with selected participants to observe the condition of the building and collect measurable data.
4. Analyze Data: Examine information gathered in the online survey, in-person interview, and building tour to identify trends, successes, and lessons learned.
5. Issue POE Report: Provide a completed report including a narrative describing the POE methodology, survey results in graph/chart form, summary of comments from in-person interview, and a conclusion of the findings.

#### **D. Post Occupancy Evaluation Participants**

1. The following Rutgers' participant groups shall be invited to participate in the survey and interview process lead by the A/E team:
  - a. School / Department Administration: Dean / Vice President and an additional member nominated by the Dean / Vice President.
  - b. Building Occupants: Faculty, Staff, and Students
  - c. Building Area Manager, Operators, and Maintenance Staff
  - d. Building Environmental Services (Custodial)
  - e. Design and Construction Project Manager(s)
  - f. Sustainability & Energy
  - g. Commissioning Agent (if applicable)
  - h. Utilities
  - i. Grounds Operations and Identity and Access Management
  - j. Public Safety
  - k. Building and Fire Code Enforcement
  - l. Environmental Health and Safety (REHS)
  - m. Office of Information and Technology (OIT)
  - n. Classroom Services (when applicable)

#### **E. Evaluation Categories**

1. The POE shall include, but may not be limited to, evaluating the following categories:
  - a. Project Vision and Design Goals
  - b. Occupancy (Assignments and Usage)
  - c. Functionality, Layout, and Types of Spaces
  - d. Exterior Environment, Grounds and Parking
  - e. Accessibility
  - f. Daylight / Lighting
  - g. Acoustic Quality
  - h. Cleanliness and Maintenance
  - i. Air Quality
  - j. Thermal Comfort (Temperature and Relative Humidity)

- k. Mechanical/Electrical Evaluation: Design Intent vs. Actual Usage (average and peak)
  - Heating: Design BTU vs. Actual BTU (from meter)
  - Cooling: Design Day vs. Quantity of chillers and BTU (from meter)
  - Electrical: Design Intent vs. Peak amp draw (from meter)
  - Mechanical / Electrical Capacity: Design Intent of Equipment vs. Actual Future Capacity
- l. Furnishing (by space type)
- m. Evaluation of Building Security
- n. Signage/Wayfinding
- o. Building Features
- p. Technology (OIT, A/V)

#### **F. Post Occupancy Evaluation Conclusion**

1. The POE report must present the qualitative and quantitative results of the evaluation categories which will be used to inform and influence the design, construction, and operation of future buildings at Rutgers.