

### Post-Occupancy Evaluations

It has become increasingly necessary for the interior design profession to demonstrate its ability to positively affect the bottom line of corporations and businesses. Much has been theorized and written about the positive effects of good design on worker productivity, effectiveness, employee recruitment and retention, and employee health. However, it has only been in the last decade or so that post-occupancy evaluations (POE) have become an additional service provided by designers, whether paid for by the client organization or considered by the design firm itself as a research and development endeavor.

Part of the difficulty in pursuing workplace evaluations in a pre-move and post-move analysis is the need for objectivity in what is often a subjective field. The academic world speaks of the need for control groups and scientific measuring devices, but these practices are rarely performed in the measurement of interior design effectiveness and do not reach the designer “in the trenches.” Therefore, interested members of the interior design industry have created powerful POE questionnaires and methodologies to analyze the impact of their design solutions, without the use of laboratory-perfect research practices. These methods of research and analysis may be conducted without great expense, often using a standard format of ranking to gather data based on the client’s perception of a number of criteria, including functionality, effectiveness, adaptability, aesthetics, privacy, environmental conditions, and safety.

Kathryn Klass, a facility management consultant who specializes in POE, describes the need for workplace evaluations. “Often described as pre- or post-occupancy evaluations, workplace evaluations are the systematic study of facilities from the perspective of the occupants. They help real estate groups understand and respond to the issues in their facilities, develop Best Practices, and build positive relationships with employees.”

Interior design professionals who specialize in POE have their own individual approaches to conducting workplace evaluations. While specific methods vary, there are some similarities. Most POE specialists agree that both pre- and post-occupancy evaluations are important. The designer should conduct the first evaluation prior to the client’s move or renovation, in order to gain an understanding of the users’ current built environment. If the designer will gather data with a questionnaire, the same questionnaire should be used for

the post evaluation(s). The post evaluations should take place approximately two to three months following the move, and facilitate feedback concerning the users' initial interaction with their new work space or environments. Ideally, the designer would schedule a third evaluation, occurring 12 to 18 months following occupancy, to potentially identify a previous "halo effect." This third evaluation would offer more in-depth feedback concerning use of common areas, adjacencies of work groups/persons, ability of design to adapt to changes, and the overall functional effectiveness of the design.

Other similarities in approach include: defining the areas the study is intended to address; developing a comprehensive yet easy to answer questionnaire; selecting a standard format of ranking methodology (i.e., a scale of 1–6, with clearly defined response levels); identifying, with the client's participation, a statistically significant pool of potential respondents; communicating the reason for the study with support from top management; and communicating the results of the study in an appropriate manner to senior management as well as to the participants.

Klass shares her experience with POE. In her practice, "pre-occupancy evaluations are performed prior to a major change in the real estate direction or as a result of significant change in the business model. The current situation is analyzed and understood in terms of its positives and negatives, and possibilities for change and improvement are identified. These evaluations establish baselines, identify priorities and specific needs of business units, and highlight issues that require addressing. It is important that such an evaluation occur prior to the planning process so that the information isn't influenced by employee feelings about potential changes." She adds that "Post-occupancy evaluations generally occur four to twelve months after a major renovation or move. Post-occupancy evaluations should not be confused with post-move surveys, which are done immediately after a relocation project, and are specific to the move process. A post-occupancy evaluation provides a measure to determine the effectiveness of space utilization and how it addresses user requirements. (Such items can range widely, i.e., personal workstation surface area, chair comfort, and file storage to building image questions, air quality, and building signage effectiveness.) It provides guidance for future planning, determines the success factors of the renovations, identifies adjustments that are desired or required, and allows a real estate group to incorporate improvements into future projects (or phases of the same project)." (See Figure 19-10.)