Post Occupancy Evaluation: Development of a Standardised Methodology for Australian Health Projects

Jane Carthey

Centre for Health Assets Australasia, Faculty of the Built Environment, University of NSW, Sydney, NSW 2052 Australia. Email: j.carthey@unsw.edu.au

Abstract

Post Occupancy Evaluation (POE) is considered an important stage of the implementation loop for health projects in Australia, allowing for feedback of evaluation results and consequent lessons into the planning stages of future projects. Although the use of POE is on the increase, the lessons learnt are not always adequately communicated or used for the purposes intended. There are many reasons for this including the lack of a commonly agreed methodology for conducting evaluations within and between different health jurisdictions in Australia. The results of this lack of standardisation include inconsistencies in data collection (type and format), in the analysis of the collected data and in the reporting of conclusions in a format useful for feeding back into the planning process.

The research project described in this paper involved a review of current POE processes used in Australia together with examples from overseas. The reasons for conducting POEs were identified and a manual titled ‘The New South Wales Standard POE Methodology’ was developed for a range of project sizes, types and locations. The resulting methodology was issued in draft form for testing on New South Wales (NSW) Health projects that occurred in late 2004. This testing was conducted by a major industry organisation who recommended that, subject to further clarification of assessment criteria and fine tuning of the methodology, NSW Health should adopt the methodology as a standard for use on all its capital projects.

Ultimately the intention is to share this methodology with the rest of Australia and New Zealand, and in the first instance, to agree to the use of an Australasian Post Occupancy Evaluation Methodology for evaluation of all health capital projects across that region. There is no logical reason why the methodology cannot be used in other countries in addition to that for which it was initially developed.

Key Words

Post Occupancy Evaluation, building evaluation, healthcare facility evaluation, facility evaluation methodology, health capital project evaluation, post implementation review

INTRODUCTION

Background

Most commentators would appear to be in general agreement that Post Occupancy Evaluation (POE) should be an integral component of the building procurement process. (Marans, 1984; RIBA, 1991; Shepley, 1997; Duffy, 1998; 2001; MARU, 2001; Zimmerman and Martin, 2001; Preiser, 2002). There is logic to the argument that one purpose for the evaluation of buildings in-use must be the provision of essential feedback to inform future actions. However despite the often ‘clear-cut’ case in support of POE, many commentators are also in agreement that POE has, by-and-large, been neglected by industry in general and the design professions in particular. Cooper (2001), for example, is of the view that, in the UK, POE has suffered almost 40 years of continued neglect. In particular, the use of POE as a feedback loop to the design process has proved to particularly intractable. As Vischer (2001, p.27) comments “...in