### POST OCCUPANCY EVALUATION

**Who should conduct the POE?**
- Traffic engineer
- Architect
- Facility manager
- Design consultant (team?)
- Maintenance staff
- Mechanical engineer
- Electrical engineer
- Project manager
- Principal / school administration
- School board administration
- Curriculum specialist
- Facility manager
- The learning environment
- Design consultant (team?)
- School administration
- Community users
- Students
- Staff
- Teachers
- Custodians
- Parents
- Staff
- Community users
- Students

**What should be conducted beforehand?**
- Engineering analysis (traffic)
- Interviews (one on one, groups)
- Visual analysis / onsite review
- Questionnaire
- Anecdotal records
- Historical incident review
- Combine with warranty inspection
- Questionnaire

**What is significant?**
- Crime prevention
- Significant findings

### Site Design and the Planning Process

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</thead>
<tbody>
<tr>
<td>1. Are the finishes appropriate for the use?</td>
<td>Architects, building occupiers, teachers</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
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</tr>
<tr>
<td>2. Does the site have an efficient shape?</td>
<td>Architects, building occupiers, teachers</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
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<tr>
<td>3. Can the facility accommodate growth and assemblies?</td>
<td>Architects, building occupiers, teachers</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
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<tr>
<td>4. Is the facility flexible enough to accommodate future uses and trends?</td>
<td>Architects, building occupiers, teachers</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
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<tr>
<td>5. Are the finishes suitable for the use?</td>
<td>Architects, building occupiers, teachers</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
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<tr>
<td>6. Are spaces used effectively?</td>
<td>Architects, building occupiers, teachers</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
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<tr>
<td>7. What do you have that you would trade for something else?</td>
<td>Architects, building occupiers, teachers</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
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</tbody>
</table>

### Implementation and Maintenance

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</tr>
</thead>
<tbody>
<tr>
<td>1. Evaluate and incorporate previous findings</td>
<td>Architects, building occupiers, teachers</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
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</tr>
<tr>
<td>2. Was life-cycle costing a consideration (short term vs. long term)?</td>
<td>Architects, building occupiers, teachers</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
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</tr>
<tr>
<td>3. Can the facility meet the Alberta education standards?</td>
<td>Architects, building occupiers, teachers</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
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<td>4. Is the facility flexible enough to accommodate future uses and trends?</td>
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<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
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<td>5. Evaluate original program assumptions</td>
<td>Architects, building occupiers, teachers</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
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<td>6. Are materials used and building details durable?</td>
<td>Architects, building occupiers, teachers</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
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<td>7. Can comfort levels be maintained / controlled (ventilation, temperature)?</td>
<td>Architects, building occupiers, teachers</td>
<td>Yes</td>
<td>Yes</td>
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<td>Yes</td>
<td>Yes</td>
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<td>8. Are there adequate spaces for special needs furnished?</td>
<td>Architects, building occupiers, teachers</td>
<td>Yes</td>
<td>Yes</td>
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<td>Yes</td>
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<td>9. Can comfort levels be maintained / controlled (ventilation, temperature)?</td>
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<td>11. Did decisions based on sustainability issues (land usage, water usage, retention of natural features, etc.) functioning as intended and were they appropriate choices?</td>
<td>Architects, building occupiers, teachers</td>
<td>Yes</td>
<td>Yes</td>
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<td>Yes</td>
<td>Yes</td>
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<td>12. Did decisions based on sustainability issues (land usage, water usage, retention of natural features, etc.) functioning as intended and were they appropriate choices?</td>
<td>Architects, building occupiers, teachers</td>
<td>Yes</td>
<td>Yes</td>
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<tr>
<td>1. Plan / budget for modifications</td>
<td>Architects, building occupiers, teachers</td>
<td>Yes</td>
<td>Yes</td>
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<td>2. Incorporate findings in future facilities and design standards</td>
<td>Architects, building occupiers, teachers</td>
<td>Yes</td>
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<td>4. Lessons learned for design of future sites</td>
<td>Architects, building occupiers, teachers</td>
<td>Yes</td>
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<td>5. Inform Alberta Infrastructure, Alberta Education about significant findings</td>
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POST OCCUPANCY EVALUATION

the site

who should conduct the POE
- facility manager
- school board administration
- school administration
- project manager
- architect
- civil engineer
- landscape architect
- traffic engineer

who do they involve
- staff
- parents
- students
- community users
- school board administration
- municipality

tools / processes
- visual analysis / onsite review
- interviews (one on one, groups)
- engineering analysis (traffic)
- historical incident review
- use patterns (worn grass)
- questionnaire

questions / topics

Site Acquisition:
1. Is the site large enough?
2. Does the site have an efficient shape?
3. Is the site level or sloped?
4. Are the adjacent land uses compatible?
5. Soils / geotechnical conditions

Site Design:
1. Is there an appropriate arrangement of components on / around the site?
2. Is the orientation of components on the site appropriate?
3. On / off site circulation (design capacity vs reality, conflicts)
4. Is the overland drainage effective?
5. Is site servicing efficient / effective?
6. Are the joint use agreements with non-school site users appropriate?
7. Is the site safe and security? (Crime Prevention Through Environmental Design (CPTED), traffic flows, lighting, landscaping)
8. Does the site consider LEED / sustainable issues (land usage, water usage, retention of natural features, etc..)?

what do you do with the data?

Site Acquisition:
1. Learn lessons for future site evaluation / selection
2. Get better site next time
3. Give information to the appropriate parties
4. Inform municipality of significant findings
5. Inform Alberta Infrastructure, Alberta Education and Alberta Municipal Affairs of significant findings

Site Design:
1. Plan for site modifications / additions
2. Increase security (staff / lighting, etc..)
3. Secure third party funding
4. Lessons learned for design of future sites
5. Give information to the appropriate parties

barriers to completing the POE

1. Time required to complete assessment
2. Resources required to complete assessment
3. User satisfaction issues are difficult to document
4. Opinions on functionality can be very personal
5. Government regulations can limit the effectiveness of application of findings (MGA)

Alberta Chapter 2007 Spring Conference
Council of Educational Facility Planners International
POST OCCUPANCY EVALUATION

the design integration and planning process 0 - 6 months

<table>
<thead>
<tr>
<th>who should conduct the POE</th>
<th>who do they involve</th>
<th>tools / processes</th>
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</thead>
<tbody>
<tr>
<td>facility manager</td>
<td>staff</td>
<td>visual analysis, onsite review</td>
</tr>
<tr>
<td>school board administration</td>
<td>parents</td>
<td>interviews (one on one, groups)</td>
</tr>
<tr>
<td>school administration</td>
<td>students</td>
<td>historical incident review</td>
</tr>
<tr>
<td>project manager</td>
<td></td>
<td>anecdotal records</td>
</tr>
<tr>
<td>architect</td>
<td></td>
<td>questionnaire</td>
</tr>
<tr>
<td>contractor / construction manager</td>
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</tbody>
</table>

questions / topics

1. Is it clear how the facility was designed to be used?
2. Does the school administration model match the building organization?
3. Ask what is working well, what isn't?
4. Observe how the user occupies / uses the spaces

what do you do with the data?

1. Plan / budget for additional furnishings / equipment
2. Incorporate findings in future facilities and design standards
3. Inform Alberta Infrastructure and Alberta Education of significant findings

barriers to completing the POE

1. Time required to complete assessment
2. Resources required to complete assessment
3. User satisfaction issues are difficult to document
4. Opinions on functionality can be very personal

Alberta Chapter 2007 Spring Conference
Council of Educational Facility Planners International
**POST OCCUPANCY EVALUATION**

**the design integration and planning process**  **12 - 18 months**

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<tbody>
<tr>
<td>facility manager</td>
<td>staff</td>
<td>combine with warranty</td>
</tr>
<tr>
<td>school board administration</td>
<td>parents</td>
<td>inspection</td>
</tr>
<tr>
<td>school administration</td>
<td>students</td>
<td>visual analysis / onsite review</td>
</tr>
<tr>
<td>project manager</td>
<td>community users</td>
<td>interviews (one on one, groups)</td>
</tr>
<tr>
<td>architect</td>
<td></td>
<td>historical incident review</td>
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<td>contractor / construction manager</td>
<td>school board administration</td>
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<tr>
<td></td>
<td></td>
<td>questionnaire</td>
</tr>
</tbody>
</table>

**questions / topics**

1. Evaluate and incorporate previous findings
2. Are the building systems (mechanical, structural, etc..) functioning as intended and were they appropriate choices?
3. Are the spaces (still) being used as designed?
4. Review space utilization, has it accommodated the events throughout the school year?
5. Evaluate original programme assumptions relative to the current situation

**what do you do with the data?**

1. Plan / budget for additional furnishings / equipment
2. Incorporate findings in future facilities and design standards
3. Inform Alberta Infrastructure and Alberta Education of significant findings

**barriers to completing the POE**

1. Time required to complete assessment
2. Resources required to complete assessment
3. User satisfaction issues are difficult to document
4. Opinions on functionality can be very personal
POST OCCUPANCY EVALUATION
the design integration and planning process 3 - 5 years

who should conduct the POE
- facility manager
- school board administration
- school administration
- design consultant (team?)

who do they involve
- staff
- parents
- students
- maintenance staff
- school board administration

tools / processes
- combine with warranty inspection
- visual analysis / onsite review
- interviews (one on one, groups)
- historical incident review
- anecdotal records
- questionnaire

questions / topics
1. Evaluate and incorporate previous findings
2. Does the facility meet the original goals / design expectations?
3. How did facility adapt over time to the needs of the users?
4. Was the facility flexible enough to met the demands of the users?
5. Can the facility accommodate unanticipated uses?
6. Does the design of the facility and layout of the spaces facilitate easy maintenance?
7. Was the original facility innovative enough to accommodate future uses and trends

what do you do with the data?
1. Plan / budget for modifications / additions
2. Inform Alberta Infrastructure and Alberta Education of significant findings

barriers to completing the POE
1. Time required to complete assessment
2. Resources required to complete assessment
3. User satisfaction issues are difficult to document
4. Opinions on functionality can be very personal
### POST OCCUPANCY EVALUATION

#### the learning environment  0 - 6 months

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<tbody>
<tr>
<td>facility manager</td>
<td>teachers</td>
<td>visual analysis / onsite review</td>
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<tr>
<td>principal / school administration</td>
<td>students</td>
<td>interviews (one on one, groups)</td>
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<tr>
<td>curriculum specialist</td>
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<td>school board administration</td>
<td>custodians</td>
<td>questionnaire</td>
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<td>project manager</td>
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<td>measurement (acoustic performance, light levels)</td>
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<tr>
<td>architect</td>
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<tr>
<td>mechanical engineer</td>
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<td>electrical engineer</td>
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<tr>
<td>other consultants (acoustic)</td>
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<tr>
<td>teachers</td>
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<tr>
<td>custodians</td>
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</tbody>
</table>

#### questions / topics

1. Are the spaces adequately equipped / furnished?
2. Can lighting levels be controlled?
3. Are acoustics adequate (within the room and separation from adjacent uses)?
4. Can comfort levels be maintained / controlled (ventilation, temperature)?

#### what do you do with the data?

1. Plan / budget for additional furnishings / equipment
2. Incorporate findings in future facilities and design standards
3. Inform Alberta Infrastructure and Alberta Education of significant findings

#### barriers to completing the POE

1. Time required to complete assessment
2. Resources required to complete assessment
3. User satisfaction issues are difficult to document
4. Opinions on functionality can be very personal
5. Implementation of results requires buy in from individuals with diverse opinions
6. Implementation of findings can take time and significant resources

**Alberta Chapter 2007 Spring Conference**

Council of Educational Facility Planners International
POST OCCUPANCY EVALUATION
the learning environment  12 - 18 months

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<td>design consultant (team?)</td>
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questions / topics
1. Evaluate and incorporate previous findings
2. Can the facility accommodate a variety of teaching philosophies?
3. Are the space dimensions suitable for the uses?
4. Are the spaces adequately equipped / furnished?
5. Are the finishes suitable for the use?
6. Is there enough storage space?
7. Is there enough natural light?
8. Are there adequate spaces for special needs students?
9. Can comfort levels be maintained / controlled (ventilation, temperature)?
10. What do you have that you would trade for something else (more millwork for less tackboard?)

what do you do with the data?
1. Plan / budget for additional furnishings / equipment
2. Plan/ budget for modifications to correct shortcomings
3. Incorporate findings in future facilities and design standards
4. Inform Alberta Infrastructure and Alberta Education of significant findings

barriers to completing the POE
1. Time required to complete assessment
2. Resources required to complete assessment
3. User satisfaction issues are difficult to document
4. Opinions on functionality can be very personal
5. Implementation of results requires buy in from individuals with diverse opinions
6. Implementation of findings can take time and significant resources

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POST OCCUPANCY EVALUATION

the learning environment  3 - 5 years

<table>
<thead>
<tr>
<th>who should conduct the POE</th>
<th>who do they involve</th>
<th>tools / processes</th>
</tr>
</thead>
<tbody>
<tr>
<td>facility manager</td>
<td>teachers</td>
<td>visual analysis / onsite review</td>
</tr>
<tr>
<td>principal / school admin</td>
<td>students</td>
<td>interviews (one on one, groups)</td>
</tr>
<tr>
<td>curriculum specialist</td>
<td></td>
<td>anecdotal records</td>
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<tr>
<td>school board admin</td>
<td></td>
<td>questionnaire</td>
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<tr>
<td>design consultant (team?)</td>
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</tbody>
</table>

questions / topics

1. Evaluate and incorporate previous findings
2. Can the facility accommodate a variety of teaching philosophies?
3. Can the facility meet the Alberta education programme requirements?
4. Is the facility flexible enough to accommodate future trends (growth, new philosophies)?
5. Are functions accommodate properly?
6. Are spaces used effectively?
7. What do you have that you would trade for something else (more millwork for less tackboard?)

what do you do with the data?

1. Plan / budget for modifications / additions
2. Incorporate findings in future facilities and design standards
3. Inform Alberta Infrastructure and Alberta Education of significant findings

barriers to completing the POE

1. Time required to complete assessment
2. Resources required to complete assessment
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### POST OCCUPANCY EVALUATION

**maintenance and serviceability  0 - 6 months**

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<tr>
<td>project manager</td>
<td></td>
<td>questionnaire</td>
</tr>
<tr>
<td>maintenance staff</td>
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<tr>
<td>architect</td>
<td></td>
<td></td>
</tr>
<tr>
<td>mechanical engineer</td>
<td></td>
<td></td>
</tr>
<tr>
<td>electrical engineer</td>
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</tbody>
</table>

### questions / topics

1. Are the finishes appropriate for the use?
2. Do the finishes suit / enhance the work or learning environment?
3. Is equipment accessible for maintenance?
4. Can the facility be operated safely (occupational health and safety)?
5. Can comfort levels be maintained?

### what do you do with the data?

1. Plan / budget for remedial work
2. Incorporate findings in future facilities and design standards
3. Inform Alberta Infrastructure and Alberta Education of significant findings

### barriers to completing the POE

1. Time required to complete assessment
2. Resources required to complete assessment
3. User satisfaction issues are difficult to document
4. Opinions on functionality can be very personal
POST OCCUPANCY EVALUATION

maintenance and serviceability  12 - 18 months

who should conduct the POE
facility manager
principal / school administration
school board administration
project manager
maintenance staff
architect
mechanical engineer
electrical engineer

who do they involve
teachers
custodians

tools / processes
visual analysis / onsite review
interviews (one on one, groups)
anecdotal records
questionnaire

questions / topics
1. Evaluate and incorporate previous findings
2. Was there any option to the selection of finishes (controlled by budget or market conditions?)
3. How were the finishes selected: affordability, maintenance issues, durability, aesthetics, user expectations?

what do you do with the data?
1. Plan / budget for remedial work
2. Incorporate findings in future facilities and design standards
3. Inform Alberta Infrastructure and Alberta Education of significant findings

barriers to completing the POE
1. Time required to complete assessment
2. Resources required to complete assessment
3. User satisfaction issues are difficult to document
4. Opinions on functionality can be very personal

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**POST OCCUPANCY EVALUATION**

**maintenance and serviceability**  3 - 5 years

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<td>maintenance staff</td>
<td></td>
<td>questionnaire</td>
</tr>
<tr>
<td>design consultant (team?)</td>
<td></td>
<td>operation and maintenance cost records</td>
</tr>
</tbody>
</table>

**questions / topics**

1. Evaluate and incorporate previous findings
2. Was life-cycle costing a consideration (short term savings vs long term savings)?
3. How effective is 'trading off of systems / assemblies' (open deck and structure has higher cleaning costs but provides more height to rooms)?
4. Did / should we experiment with new products (before they have a track record?), was it successful?

**what do you do with the data?**

1. Plan / budget for remedial work
2. Incorporate findings in future facilities and design standards
3. Inform Alberta Infrastructure and Alberta Education of significant findings

**barriers to completing the POE**

1. Time required to complete assessment
2. Resources required to complete assessment
3. User satisfaction issues are difficult to document
4. Opinions on functionality can be very personal

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## POST OCCUPANCY EVALUATION

### sustainability

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<tr>
<td>school board administration</td>
<td>parents</td>
<td>interviews (one on one, groups)</td>
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<tr>
<td>principal / school admin</td>
<td>students</td>
<td>anecdotal records</td>
</tr>
<tr>
<td>project manager</td>
<td>community users</td>
<td>questionnaire</td>
</tr>
<tr>
<td>maintenance staff</td>
<td>school board admin</td>
<td>energy efficiency results</td>
</tr>
<tr>
<td>architect</td>
<td>municipality</td>
<td>water efficiency results</td>
</tr>
<tr>
<td>mechanical engineer</td>
<td></td>
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<tr>
<td>electrical engineer</td>
<td></td>
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</tr>
<tr>
<td>other consultants (structural, acoustic, landscape architect, transportation)</td>
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<td></td>
</tr>
</tbody>
</table>

### questions / topics

1. Are the occupants informed about the sustainability issues in the facility?
2. Assess user satisfaction (functionality, space comfort levels, flexibility)
3. Can the facility accommodate growth and change?
4. Can comfort levels be maintained?
5. Evaluate decisions made as a result of life-cycle costing
6. Are materials used and building details durable?
7. Audit facility use patterns
8. Identify new initiatives
9. Does the facility consume less energy than a typical building?
10. Does the facility consume less water than a typical building?
11. Do the occupants manage lighting to optimize daylighting?
12. Did decisions based on sustainability issues compromise space utilization, user satisfaction, maintenance or operation.

### what do you do with the data?

1. Plan / budget for remedial work
2. Incorporate findings in future facilities and design standards
3. Inform Alberta Infrastructure and Alberta Education about significant findings

### barriers to completing the POE

1. Time required to complete assessment
2. Resources required to complete assessment
3. Some issues take a long time to evaluate / get results

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