

Post occupancy evaluation - key early checks

Check (and suggested timing)	Select suggested methods of compliance as appropriate or indicate in next column any alternative method of compliance agreed	Alternative means of compliance agreed	Comments or remedial action agreed	Final sign off
1.0 Performance of the building services				
1.1 Adequacy of building services commissioning records verified	Record sheets for all items in commissioning schedule signed by competent person and placed in O and M Manual	○		
1.2 Satisfactory methodology in place for those building services items known to require post handover commissioning	Contract documents held by project manager include a methodology for resolving items on agreed list. This details activities of key players, and time frames for action	○		
1.3 Completion of post handover commissioning	Records of any post handover commissioning undertaken are signed off by the facilities manager and kept in the O and M Manual	○		

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2.0 Operation of the controls and building management system					
2.1 Adequacy of BMS and controls commissioning records verified (Month 3)	Record sheets for all items in commissioning schedule signed by competent person and placed in O and M Manual	○			
2.2 Satisfactory remedial actions in place for those controls and BMS items requiring post handover commissioning	Contract documents held by the project manager include a methodology for resolving items on agreed snag list, which details actions, responsibilities and time frames for action.	○			
2.3 Completion of post handover commissioning	Records of any post handover commissioning are signed off by the facilities manager and kept in the O and M Manual	○			
3.0 Initial technical information, support and facilities staff training					
3.1 Adequacy of O and M Manual verified at handover	The contents comply with the requirements laid down in the HOBO (see note 1) document. To be signed off by the project manager and placed in the O and M Manual	○			
3.2 Schedule of facilities staff training approved (to include technical staff, security staff, and cleaning staff etc as appropriate)	Confirmation that facilities staff training will be undertaken as per the original contract documentation. This should provide details of: the programme; numbers to be trained; means of testing and certification; and any other items required. Detailed requirements confirmed as appropriate by the design and building management teams and signed off by the facilities manager	○			

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3.3 Formal training programmes undertaken for both internal and outsourced facilities staff as appropriate	Appropriate training has been undertake as agreed (including study of the O and M Manual and emergency procedures). Signed training records for all relevant facilities staff are supplied, held and managed by the facilities manager (or Human Resources Director as appropriate)	<input type="radio"/>		
3.4 Suitability of O and M Manual reviewed by occupier	<p>a) Initial comments by the facilities manager on the suitability of the O and M Manual at the time of handover have been received</p> <p>b) Further comments have been received from the facilities manager and facilities staff after training is complete and experience has been gained</p> <p>c) Revisions made to O and M Manuals as appropriate (ie error or inadequacy) and signed off by the facilities manager</p>	<input type="radio"/> <input type="radio"/>		
3.5 Confirm that appropriate operational and maintenance procedures are in place	<p>a) Early discussions have taken place between the client and the design team to confirm requirements, which have now been acted upon.</p> <p>b) Discussions are currently ongoing to put in place appropriate procedures</p>	<input type="radio"/> <input type="radio"/>		

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4.0 Initial information and training for non-technical staff					
4.1 Staff handbook preparation	a) Draft staff handbook has been included in the O and M Manual b) Facilities Manager has proposed revisions to the staff handbook to suit the actual use of the building c) Facilities Manager has approved the final version of the handbook prior to publication	<input type="radio"/> <input type="radio"/> <input type="radio"/>			
4.2 Schedule of staff training	A detailed programme of training has been prepared, which includes any elements agreed within the original contract documents, and has been agreed with the Facilities Manager	<input type="radio"/>			
4.3 Staff training undertaken	Signed training records (or a list of all those having attended) for all relevant staff are held and managed by the Facilities Manager (or Human Resources Director as appropriate)	<input type="radio"/>			
4.4 Staff handbook distributed	Notes of issue to, or receipt by, staff to be included in the training records above. Copy of the handbook issued to be held by the Facilities Manager within the O and M Manual	<input type="radio"/>			

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5.0 Keeping building information up to date				
5.1 Suitable arrangements made to store plant drawings and building documentation for ease of viewing and updating, together with a secure archive	Facilities Manager confirms that arrangements are in place, details of which are held with the O and M Manual	<input type="radio"/>		
5.2 Ease of access to emergency information verified	Facilities Manager confirms that emergency information is clearly highlighted within the O and M Manual, and emergency procedures are properly included in staff training	<input type="radio"/>		
5.3 Formal responsibility for updating of building information allocated	Facilities Manager confirms that adequate arrangements are in place, with details held in the O and M Manual. All changes made, and the reasons why, are recorded in the O and M Manual	<input type="radio"/>		
5.4 Appropriate BMS trend logging established	Facilities Manager confirms that a system is in place and that this has been discussed with the relevant Project Team members	<input type="radio"/>		
5.5 Suitable monitoring and targeting programme established for water and energy consumption	Facilities Manager confirms that this is in place, accompanied by adequate sub metering, and guidance from the Project Team on expected first and subsequent year s performance	<input type="radio"/>		
5.6 Appropriateness of maintenance budget and staff verified	Facilities Manager confirms that any pre-existing budget and resource forecast has been considered in the light of building performance	<input type="radio"/>		

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5.7 Mechanisms established for appropriate routine observational checks by Facilities Management staff	Facilities manager confirms that mechanisms have been put in place to carry out routine observational checks. The method to be used is included within the O and M Manual and updated as required.	<input type="radio"/>			
6.0 Keeping training up to date					
6.1 Formal arrangements made to train new technical and building management staff	Facilities Manager confirms that adequate arrangements are in place and that Human Resources (if appropriate) have been made aware of this need. Arrangements are documented in the O and M Manual	<input type="radio"/>			
6.2 Feedback sought on the adequacy of the training given and remedial measures taken	Facilities Manager confirms that a system of post-training interviews is in place; that any feedback received is recorded and held with the O and M Manual; and that remedial action is taken	<input type="radio"/>			
6.3 Formal arrangements made to train new staff occupying the building	Facilities Manager confirms that adequate arrangements are in place and that Human Resources (if appropriate) have been made aware of this need. Arrangements are documented in the O and M Manual	<input type="radio"/>			
6.4 Feedback sought on the adequacy of the training and documentation given to end users	a) Facilities Manager confirms that all (or a representative sample) of staff have been consulted with regards to the adequacy of the training received	<input type="radio"/>			
	b) The staff handbook contains a feedback form on which staff can comment on the quality of the training and documentation received	<input type="radio"/>			

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7.0 Client learning and feedback				
7.1 Formal interviews carried out with key staff, eg IT and HR Directors and Managing Director to obtain both positive and negative building performance feedback	Facilities Manager confirms that a system is in place and that records of discussions held and actions taken are held with the building log-book	○		
7.2 Formal end user post occupancy satisfaction survey undertaken to obtain both positive and negative building performance feedback	Facilities Manager confirms that a system is in place and that records of discussions held and actions taken are held with the building log-book	○		
7.3 Formal interviews carried out with facilities staff / maintenance team to obtain both positive and negative building performance feedback	Facilities Manager confirms that a system is in place and that records of discussions held and actions taken are held with the building log-book	○		
7.4 Lessons learnt from the building in relation to the suitability of original brief over the first 12 months' occupancy formally recorded	In the case of a repeat client a formal consideration of the implications for the original building brief has been made and the record taken passed to the appropriate client representative	○		
7.5 Widely promoted end user contact point or help facility available to log and to assist with complaints	Facilities Manager confirms that this is available and that records of all complaints logged, with the remedial actions undertaken, are recorded and kept with the O and M Manual	○		

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7.6 Feedback provided to staff on building operation	Facilities Manager confirms that system is in place to feed back details of building performance and staff survey activity to staff	<input type="radio"/>		
7.7 Formation of building user group to provide continuous feedback	User group has been formed with a clearly defined remit and reporting mechanism	<input type="radio"/>		

8.0 Client / design team communication				
8.1 Client aware of contact details for relevant project team members should problems occur	Contact details for all involved parties are located within the building log-book	<input type="radio"/>		
8.2 Special arrangements for persistent problems have been put in place	Explicit processes have been documented which indicate the circumstances under which it is appropriate to involve the project team in collaborative problem solving, and the manner in which this should be achieved.	<input type="radio"/>		
8.3 Design team involvement in client feedback activities	Explicit agreements have been made as to whether and the extent to which the design team should be involved in the activities listed in Section 6.0.	<input type="radio"/>		
8.4 Formal wash-up sessions planned between the client and the project team	a) An end of first year of occupation meeting will take place between the Facilities Manager and the project team to consider the issues arising from this process.	<input type="radio"/>		
	b) A more frequent documented system of review has been put in place to correspond with the original contract requirements or at a frequency agreed between the Facilities Manager and the design team	<input type="radio"/>		