



photo: Bruce Damonte

Why a Shared Evaluation Walk?

A Shared Evaluation Walk can be a powerful way to learn about past projects and advance best practices, without engaging in a formal post-occupancy evaluation.

It is a **feed-forward** mechanism, which means architects from the firm visit a previous project with the client in preparation for a new project, making the lessons learned resonant and immediately actionable. It is also methodical and replicable, using simple templates for gathering data systematically across projects, but in a way that can be used by anyone, regardless of previous knowledge. Another value of the Evaluation Walk is that it can be easily disseminated. After the walk, results can be easily collated into a basic report.



There are two essential ingredients of the Shared Evaluation Walk:

1 It is Shared

At a minimum, the property manager as well as project managers from architect and developer for the new project should participate in the walk, as well as the contractor or construction manager, if they are on board. In addition to collecting feedback, the shared experience sets a basis of shared values and priorities for a new project. Let this inform what you prioritize as you make observations on your walk, paying special attention to the factors of human experience that may otherwise be invisible or overlooked in the design process.

Invite key senior-level staff from both organizations if available. *(e.g. Principal Architect in Charge, Technical Director or Construction Administration Specialists; and from the owner's side, Senior asset management or construction management)*

2 It is Systematic

The following template is meant to impose a discipline for recording consistent observations. This is important so that the results do not favor only the most visible or top-of-mind issues for individuals in the tour group. Systematic observation also allows that results can be compared across projects.

To maximize usefulness of the evaluation, also consider...

1 Prepare

Invite the right stakeholders and distribute the template for note-taking. Then gather initial feedback from property manager or facilities manager who will be leading the tour ahead of time using a questionnaire or interview.

This can help prioritize time, prime the property staff to understand the general topic areas of Program & People, Environmental Quality, and Usability & Maintenance, and it creates a shared responsibility for leading a successful visit. Any written responses or notes directly from management can add detail to any final report.

2 Visit

Visit multiple projects. It can work well to schedule a day of site tours that includes 2–4 existing projects managed by the client. Including projects designed by different architects adds additional value (they don't all have to be your projects, in fact you learn more if they're not).

3 Note

Note weather, season and time of site visit so that observations about exterior spaces and interior lighting conditions are placed in context.

4 Measure

Bring along measurement equipment to put data to observations about the environment.

These may include surface temperatures, decibel levels, light levels, glare or air speed. Follow this link to see DBA's recommendations for affordable measurement devices.

5 Collect, report and share

Create a report of observations that compiles photos and written notes.

A report memorializes what was observed and formalizes any lessons learned that may have been discussed on site. A consistent report format also enables you to compare observations from similar types of spaces as you conduct walks over time; for example, by pulling notes from all the community rooms and comparing side-by-side. A report can be compiled relatively quickly using the attached template as a suggested format.

Program & People

Space function, location and size, how spaces are used, social interaction, security and management



SPACE	WHAT TO LOOK FOR
OFFICE SUITE	Sufficiency of break, storage and conference amenities, perceived safety, ease of access control, resident accessibility
COMMUNITY ROOM	Management of access and openness, especially connection to adjacent spaces. How room is used, unplanned uses. Kitchen
LAUNDRY ROOM	Sufficiency of space, number of appliances and amenities (seating, folding), success of programmatic adjacencies
OTHER AMENITY SPACES (eg fitness, computer)	How well spaces used, unexpected uses, success of programmatic adjacencies
OPEN SPACE	Management of access, security. How well spaces are used for intended function (ie play area), unexpected functions.
ENTRY AND LOBBY	Feeling of welcoming, access, and architectural wayfinding. Social function of mail and informal gathering spaces
STAIRS & ELEVATOR	Use of main/open stairs including sightlines/welcoming. Security of exit-only stairs.
CORRIDORS	Corridor width and blind corners. Ease of wayfinding, length, interruption, inhabitation of entries. Unplanned uses of landings
DWELLING UNITS	Space flow/ circulation efficiency and furnishability, feeling of entry, storage sufficiency for cleaning and non-everyday items, pantry storage, kitchen accessibility, trash, ceiling height
TRASH ROOMS	Location of trash rooms, collection plan. Ease of access, legibility, sufficiency for type of waste (cardboard, compost)
GARAGE	Layout, maneuvering ability including ceiling height. Perceived safety and sightlines, access control.
CENTRAL SYSTEMS (hot water plant, RTUs, PV)	Utilization of roof for PV, other equipment and program
MAINTENANCE OFFICE / WORKSHOP	Storage sufficiency, layout efficiency, access
OTHER SERVICE AREAS (eg bikes, IDF, storage)	Sufficiency of space, pattern of usage and access issues for bike and storage rooms



Environmental Quality

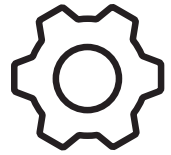


Perception of noise, odors, light, views, privacy, windows, air flow, ventilation, thermal comfort, and the amount of personal control afforded.

SPACE	WHAT TO LOOK FOR
OFFICE SUITE	Ability to control visibility while maintaining daylight, solar radiation and glare, thermal comfort, air quality, acoustic control
COMMUNITY ROOM	Perceived daylight and openness/biophilic design
LAUNDRY ROOM	Air quality, smells and sound. Sound transmission to units. Is it a pleasant room to spend time in
OTHER AMENITY SPACES (eg fitness, computer)	Acoustics, lighting, view, ventilation and thermal control appropriate to the program and adjacent spaces
OPEN SPACE	Sound (noise, pleasant sounds). Heat, shade, brightness and visual comfort (reflectivity of surfaces). Breeze/wind control.
ENTRY AND LOBBY	Air quality, thermal and lighting dynamics. Decompression, feeling of arrival, biophilic design
STAIRS & ELEVATOR	Air quality, smells, light quality.
CORRIDORS	Wind, sun, rain in open corridors. Air quality, smells and light quality in enclosed corridors. Acoustic quality
DWELLING UNITS	Visual comfort and daylighting, acoustic control, equipment noise, solar radiation, effectiveness of window treatments, artificial lighting quality. Evidence of indoor pollutant management
TRASH ROOMS	Cleanliness, products used
GARAGE	
CENTRAL SYSTEMS (hot water plant, RTUs, PV)	
MAINTENANCE OFFICE / WORKSHOP	Inhabitability of space for facilities manager: air quality, light, view
OTHER SERVICE AREAS (eg bikes, IDF, storage)	



Usability & Maintenance



Function, usability, and maintainability of equipment, systems, including products and finishes. This would also include documenting any operator changes, actions.

SPACE	WHAT TO LOOK FOR
OFFICE SUITE	HVAC system legibility and serviceability. Thermostats and switches. Flooring and furniture/casework quality
COMMUNITY ROOM	HVAC system legibility and serviceability. Thermostats and switches. Flooring and furniture/casework quality
LAUNDRY ROOM	Air filtration, plumbing and venting issues, serviceability
OTHER AMENITY SPACES (eg fitness, computer)	
OPEN SPACE	State of planting, durability of furnishings and play equipment and surfacing. Use and usability of irrigation control system
ENTRY AND LOBBY	Effectiveness of daylighting and occupancy controls. Noting lighting, fans, and conditioning equipment that is loud, operating when it doesn't need to be. Floor and wall finishes, retrofit history. Other cleaning/maintenance issues. Elevator maintenance and weather protection.
STAIRS & ELEVATOR	
CORRIDORS	
DWELLING UNITS	HVAC system legibility and serviceability. Thermostats and switches. Flooring and casework quality, retrofit history, findings of recent needs assessments. Appliance quality
TRASH ROOMS	Ventilation, occupancy control of lighting and fans
GARAGE	Occupancy control of lighting and fans. Functionality and durability of parking lifts and garage door
CENTRAL SYSTEMS (hot water plant, RTUs, PV)	Recurring or major O&M issues. Filter access, replacement history, vendor responsiveness. Control practices. BMS data
MAINTENANCE OFFICE / WORKSHOP	Occupancy control of lighting and fans, durability of finishes
OTHER SERVICE AREAS (eg bikes, IDF, storage)	