

POST OCCUPANCY EVALUATION WORKSHOP

OUR DYNAMIC EARTH, EDINBURGH

10 JUNE 2005



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OUR DYNAMIC EARTH, EDINBURGH
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INTRODUCTION

In June 2004 the Scottish Executive launched the publication *Evaluation* as part of the School Estate Strategy series *Building Our Future: Scotland's School Estate*. It offers guidance on evaluating and learning from completed school projects. In particular, it is intended to assist Local Authorities in evaluating how well a completed school building project meets the needs of pupils, staff, parents and the wider community. The evaluation process is highlighted through a case study evaluation of a primary school.

There is a growing emphasis being placed on the importance of evaluation as both a quality and continuous improvement tool. One year on from the publication of the document, the Scottish Executive is pleased to take further steps to support Local Authorities' evaluation work on the school estate. Representatives of the Scottish Executive have recently participated in an 'expert group' meeting on Evaluating Quality in Education Facilities which was run by the OECD's Programme on Educational Buildings, in Lisbon. We have also funded a further evaluation case study, this time at a secondary school, and the outcomes will be published shortly.

Building on this, and in order to share developments and experiences of schools evaluation with local authorities, the Scottish Executive organised a one-day workshop on Post Occupancy Evaluation (POE) of schools on 10 June 2005 at Our Dynamic Earth in Edinburgh. The first half of the workshop comprised presentations from Eileen Gill (Scottish Executive, School Estate Branch), Chris Watson (People Environment Studies), Keith Thomson (Scottish Executive, School Estate Branch), and Colin Proctor and Paul Crilly (Gardiner and Theobald). In the second half of the workshop, delegates broke into smaller discussion groups to share their experiences and present their views.

The workshop was deemed by participants to have been a success. We are very pleased that 24 out of 32 Local Authorities were represented, and that so many issues were aired and discussed on the day. It was encouraging to find an overwhelming consensus that evaluation is both valuable and necessary to ensure a continuing improvement in the school estate. We hope that this event has assisted authorities in developing their existing evaluation programmes and in addressing some of the challenges which need to be overcome to make evaluation of school buildings a mainstream activity.

One of the main themes to emerge from the discussions was how information and best practice could be shared more widely amongst authorities. To capture and disseminate key issues which emerged from this event, we are publishing this workshop report and circulating it widely to school estate stakeholders.

PROGRAMME

9.30 – 10.00	Coffee and registration
10.00 – 10.10	Welcome: Frank Newall, School Estate Branch, Scottish Executive
10.10 – 10.30	Introduction: Eileen Gill, Head of School Estate Branch, Scottish Executive
10.30 – 11.15	Presentation: <i>Post Occupancy Evaluation for Understanding Strengths and Weaknesses of Buildings in Use</i> by Chris Watson (People Environment Studies Ltd) and Keith Thomson (School Estate Branch, Scottish Executive)
11.15 – 11.30	Coffee
11.30 – 12.00	Presentation: <i>POE√ Improvement</i> by Colin Proctor and Paul Crilly (Gardiner & Theobald)
12.00 – 12.15	Setting scene for breakout groups
12.15 – 13.00	Breakout session 1
13.00 – 14.00	Lunch & networking
14.00 – 15.00	Breakout session 2
15.00 – 15.50	Feedback: From breakout sessions plus Question and Answer session
15.50 – 16.00	Closing remarks: Frank Newall, School Estate Branch, Scottish Executive

PRESENTATION 1

Introduction and Scene Setting

Eileen Gill, Head of School Estate Branch, Scottish Executive

The general purpose of the workshop was to raise awareness about evaluation and facilitate the learning and sharing of good practice among local authorities. A brief overview was given of the School Estate Strategy, presenting its vision and objectives, as well as the School Estate Management Plan process.

Eileen mentioned that evaluation allows continuous improvement to the education environment. The principal benefits of POE, as highlighted in the guidance published by the Scottish Executive, include the following:

- › 'Fine tuning' and evaluating existing buildings
- › Improving the design of future buildings
- › Demonstrating best value
- › Involving stakeholders

Eileen continued with a brief explanation of the various types of evaluation, POE being one approach amongst others such as Project Process Evaluation and Post Project Reviews. An explanation of the structure of the two breakout sessions for the day was also given.

The presentation ended with a list of next steps to be taken by the Scottish Executive which were:

- › Undertake a further case study of Braes High School, Falkirk
- › Publish a workshop report
- › Promote further sharing of good practice

PRESENTATION 2

POE for Understanding Strengths and Weaknesses of Buildings in Use

Chris Watson, Architect, People Environment Studies Ltd and Keith Thomson, Scottish Executive

Chris Watson provided an introduction to his approach to POE by explaining the basic principles and methodology illustrated by examples from various case studies.

Benefits

POE will make occupants feel that their views are valued and form part of problem resolution. Clients will find that it promotes co-operation and tolerance in a non-threatening way, demonstrates complexity and respect for users' views, and is fast, easy and cost-efficient. POE also provides benefits to project teams in terms of illustrating successes, defining problems, engendering respect and maximising learning.

Methodology

The principal methodology used by Chris is to facilitate 'walk-through interviews' with groups of participants on site. This provides a fast and thorough way of recording stakeholders' views. At the end of the fieldwork, the comments from all groups are arranged under a series of common issues which generate recommendations for action. Comments are listed as quotes and are un-edited, as far as possible, to promote transparency. Pictures taken during the walkthrough sessions help to illustrate the issues raised. Additional methods of POE include surveys, forums and observations.

Results

Examples of themes which have frequently emerged in previous POE exercises are:

- › Access to facilities
- › Thermal comfort and air quality
- › Ambience and atmosphere
- › Acoustic issues
- › Design and construction defects

More recently, POE has also developed an increasingly important role in helping to assess the sustainability credentials of buildings in use.

Case studies

Chris described the process of conducting a POE of Marlborough Technology Centre, a rural school in Australia. The evaluation involved 48 participants which included students, staff, parents, managers, education specialists and the project team. The evaluation generated responses relating to over 50 issues such as playground facilities, staff facilities, cleaning and maintenance, windows and sub-floor ventilation.

Chris finished by presenting some of the findings from a POE of Craigour Park Primary School in Edinburgh (the demonstration POE included in the Scottish Executive's evaluation guidance). This evaluation involved 35 stakeholders from 6 groups, including staff, pupils, parents and education officials. Responses were balanced, with very positive comments regarding the design of the principal teaching spaces, but there were some problems concerning issues such as security arrangements, lunch queuing and data projection.

A Scottish Executive perspective

Keith Thomson, from the School Estate branch in the Scottish Executive, had observed two POEs conducted by Chris Watson. While the Scottish Executive's guidance makes it clear that it is up to local authorities to decide on the scope and type of evaluation for their particular needs, Keith noted there were certain aspects (listed below) of Chris's POE approach which support good stakeholder consultation – a key principle of the School Estate Strategy in Scotland.

1. The method is flexible and accessible:

- Authorities can control the scope of each study
- No technical knowledge is required by participants
- No prior knowledge of the school is required by participants

2. It involves a participatory approach which can:

- Support wider educational goals for students
- Enhance school ethos for building users
- Increase school-community links

3. The approach is simple and efficient in that:

- No pre-set agenda avoids wasting time and energy
- The building itself illustrates and promotes issues for discussion
- The presentation method is inclusive, transparent and effective

Lessons from Lisbon

Keith finished the presentation by drawing upon some lessons learned from an international meeting on School Building POE (held in June 2005 in Lisbon, Portugal) organised by the OECD's Programme on Educational Building. The purpose of the meeting was to gather perspectives of school POE methodologies, and investigate whether some form of international standard for evaluation could be implemented to measure the quality of school buildings. There was discussion about which principles of assessing quality in school buildings could be shared between countries, and what criteria could be used to measure these principles. Keith's view was that it seems a realistic prospect to identify some common principles such as sustainability, environmental issues, flexibility, and community use. However, the criteria to measure these qualities may have to be determined locally, where different countries may have different priorities. The OECD are planning to take this work forward with a further meeting in early 2006.

PRESENTATION 3

POE✓ improvement

Colin Proctor and Paul Crilly, Gardiner and Theobald LLP

The presentation sought to open a conversation on widening the agenda for Post Occupancy Evaluation. It places it within a context of continuous improvement and explores how it could be taken forward within the Scottish schools investment programme.

The overriding argument presented was threefold:

- That accommodation projects are not just about building buildings – operational effectiveness is a main driver
- That you need to consider process over product – because it is only through a process that you obtain that product
- That post project evaluation in its widest sense, i.e. including post occupancy evaluation, needs to be focussed on seeking continuous improvement in that process

POE is a focus on management that considers:

- Investment appraisal
- Procurement
- Project management
- Operational management

POE should be viewed as a component part of overall project evaluation and appraisal. It is an important tool in performance management and can, if incorporated effectively, assist local authorities in their task to meet best value objectives.

POE is a tool to be used for improving the preparation of investment appraisals, project briefs, and the operational management of facilities. Local authorities should consider how POE can become standard practice for all forms of procurement. A degree of consistency in approach is required if its use is to really benefit strategic programme management.

The strategic context for the education programme is complex, involving a large number of interested parties. The process is one of educational transformation through the management of a programme of events that deliver our capital projects. Through project evaluation techniques, we need to refine a process that should commence with the initial business case.

The early appraisal of projects is becoming much more of a task. The agendas are getting wider all the time, definitions of value money have changed, sustainability is a key factor, and we now have to consider mixed-use bringing with it a further set of criteria. All of this leads towards a requirement for much more comprehensive evaluation techniques. This requires wider market knowledge and expertise.

There is a new range of procurement routes. As one moves through a risk continuum from conventional procurement models to joint ventures and Private Finance Initiatives (PFI), do the requirements for project evaluation change?

Arguably, PFI already contains a structure for the implementation of post project evaluation – although there is little evidence that the process is being applied. Opportunities exist for looking back as well as forward in the POE exercise.

The programme management context is one where project evaluation really comes into its own. Those who have a known programme and who are setting up frameworks will want to achieve continuous improvement after each project. Benefits such as reduced costs, reduced risk, reduced re-work, reduced waste, increasing customer satisfaction, improving quality, improving problem solving, integration of innovation, incorporation of best practice, building trust, improving teamwork, and increasing profit can be more readily managed if it can be seen that there is a strategic relationship, that a supply chain can be formed, and that support systems are put in place. A crucial part of such support systems is knowledge learned from experience.

Best practice clients also now adopt a whole life approach to projects. The facility is there to support the needs of the organisation over the long term. POE has a key role to play in providing a platform for facilities management.

Organisations do not learn automatically, and need a systematic approach. It is not something that can be left to chance. Toolkits are available on how to share lessons, and how to turn these to business advantage.

Effective learning requires a willingness to share experience and ideas freely between participants in the process, and this can often be a barrier to success. This is an important issue for the management of the programme at a strategic level.

Who you involve in project evaluation is a key issue. Who will be measuring the outcomes and successes? If you don't involve someone, could it invalidate the exercise? Is the process of undertaking a POE exercise as important as the output from the exercise?

Key requirements for influencing effective implementation include:

- › Needs to be driven from the top
- › Requires buy-in
- › Needs to be planned for
- › Needs clarity of purpose
- › Requires consistency
- › Requires good process, appropriate for purpose and organisation

GROUP DISCUSSIONS

Following the presentations, delegates broke into four groups for discussion. Each group considered five questions about POE, over two sessions, before feeding back to a plenary session. The following summary captures the main points made.

QUESTION 1: WHAT TYPE OF POE, IF ANY, IS BEING CARRIED OUT AT PRESENT OR IS PLANNED IN YOUR COUNCIL?

Most authorities have done/are doing some form of evaluation

Most local authorities have done/are doing some form of evaluation on completed school building projects, although very few are conducting what they would term formal POE exercises. However, several of these authorities indicated that they would plan to take POE on board after the workshop.

Most authorities which are currently involved in their second PPP programmes had received feedback from their first project to inform their second. However, it appeared that POE was not being included as a contractual requirement in Public Private Partnership (PPP) projects.

One authority was in the process of conducting a POE exercise in a non-PPP primary school. The first phase, which involved an experts' walkthrough and debrief, was complete. The next stage will be to interview parents and children. Thereafter, there are plans to evaluate a joint campus school and then use these experiences of POE to inform their PPP Invitation to Negotiate (ITN).

Evaluation exercises are generally being conducted 'in-house'

Most authorities are commissioning, designing and conducting the evaluation exercises 'in-house' using council Education and Property staff. However, a few authorities have engaged external architects to help assess technical outcomes, and one has considered using a university research department.

Most evaluation exercises involve consultation with stakeholders

Most evaluation approaches have involved consultation with stakeholders – in many cases involving end users (staff, pupils and parents). Some have restricted their consultations to council officials (Education and Property) and headteachers.

QUESTION 2: WHAT DO YOU SEE AS THE BARRIERS/CHALLENGES TO MAKING POE A REGULAR ACTIVITY?

Lack of resources

The lack of time was considered a major factor in restricting POE activity. It is necessary to ensure that staff are allocated dedicated time to participate, and this can be difficult to arrange/fund during school hours.

While all authorities agreed that there are benefits arising as a result of carrying out POE, the lack and uncertainty of funding available to undertake the studies and implement their recommendations was also seen as an issue restricting POE activity to date.

Lack of experience

It was noted that that few 'in-house' local authority staff had POE experience, and few external organisations either had, or were actively marketing, Post Project or Post Occupancy Evaluation expertise and services.

For some local authorities it was unclear who was responsible for carrying out POE, as it was not identified in any job description. One authority noted that the work was given to staff who were already facing existing workload challenges relating to school building issues – such as preparing School Estate Management Plans.

Fear of criticism

Many authorities (particularly elected members, but also senior officials) are concerned that evaluation exercises may lead to public criticism for any (even relatively minor) design failures in new buildings. There is also a risk of creating unrealistic expectations about what action will be taken to follow up recommendations.

Fear of blame or contractual and insurance concerns may also limit the willingness of design teams and contractors to participate in formal evaluation exercises. Private sector design professionals may find that participating in POEs may affect their professional indemnity insurance premiums. Legal and contractual issues may also inhibit a contractor's ability to participate in evaluation exercises, particularly in PPP projects.

QUESTION 3: WHAT DO YOU SEE AS THE BENEFITS OF UNDERTAKING POE?

Allows 'fitness for purpose' to be assessed

A principal benefit of POE is the opportunity to assess 'fitness for purpose' of the building. It can demonstrate how well the building is being used and can identify adjustments to both the building and to management practices which can optimise its use. The results can also be used to rank 'suitability' in School Estate Management Plans/Core Facts.

Provides a good platform for stakeholders to air their views

Irrespective of the outcomes of POE exercises, the very act of conducting them sends a positive message that authorities are seen as acting responsibly, being accountable and carrying out genuine consultation. In addition, the participatory approach can have educational value for pupils and staff. It can help building-users to understand project constraints and thereby lead to increased user satisfaction and co-operation.

Will help improve design quality

POE has a role in improving design quality, as it provides an opportunity to feedback good and bad design features for incorporation/omission into future briefing and design. It provides a way of researching innovative design or policy areas, and the outcomes can be used to develop good practice guidelines. Furthermore, it can allow detailed feedback on parts of buildings which may not otherwise receive a lot of design time on new projects (e.g. toilet and cloakroom layouts, lockers, furniture, etc.).

Assists in streamlining future procurement processes

POE of a completed project helps to promote continuity within a programme, as it can be seen as both the end of consultation on one project and the starting point of the next. It can assist in achieving a more streamlined briefing and design process, and be seen as a valuable tool for future projects as less 'first principles' research and consultation is required. POE might also help set more realistic budgets for future projects which would lead to potential savings.

QUESTION 4: WHAT NEEDS TO HAPPEN FOR POE TO BE CARRIED OUT SUCCESSFULLY?

Commitment, clarity and leadership

There needs to be a greater clarity about the purpose of POE, and this requires greater leadership by local authorities, the Scottish Executive and building professionals. The process of POE must be seen as being genuine and not a token gesture. One authority noted that, from the start of any building project, everyone involved should be made aware of the intention to carry out POE. They should also be made aware of the procedure and the time commitments required, and be willing to participate. In terms of policy drivers, it was suggested that POE is relevant in terms of continuous improvement of service delivery, best value, and sustainability.

Clients and participants must be prepared to accept constructive criticism

There needs to be a commitment and attitude of openness and 'bravery' on the part of the client and participants. One authority noted that clients and participants have to prepare themselves to receive constructive criticism and admit mistakes. Participants should avoid using the exercise to defend reasons for previous decisions, and a blame culture should be discouraged. There is a need to dispel the myth that 'we (the council/building professionals) know best'. Equally, there must be council 'buy-in' and commitment to dealing with the results which must be seen as reasonable and fair. The evaluation itself must be conducted within a culture of honesty, and both positive and negative opinions should be welcomed.

Facilitator needs to be neutral

The need to have a neutral facilitator was considered important. Although this may cost more than using 'in-house' personnel, one authority noted that this was often necessary in order to prevent participants from following personal agendas.

Expectations of stakeholders need to be managed

One authority emphasised the need for expectations and aspirations raised by POE to be managed. It was argued that it was of prime importance to educate stakeholders on the reality of project costs, value for money, etc. If not, they may complain about things that could only be achieved in an ideal scenario.

Process should be comprehensive

The evaluation process needs to be comprehensive in terms of the range of stakeholders to be consulted. A wide range of views should be sought, and the opinions of pupils should include those from individuals who may be regarded as disruptive.

There was general support for the view that POE should be seen in the context of a full stakeholder consultation. It was also felt that any programme of evaluation should be estate-wide, and conducted regularly in order to engender widespread support. A number of authorities also felt that POE

should be employed beyond the school estate, and that all buildings across the public sector should be included (referring to local authorities' role in Community Planning under the Local Government in Scotland 2003 Act). However, a caveat was mentioned regarding the raising of expectations and the limited budgets available to deal with the results.

There was also concern about the term POE, as it implied a 'once-only' exercise when a more ongoing system of evaluation is perhaps more relevant. For this reason, one delegate suggested the renaming of Post Occupancy Evaluation to Periodic Occupancy Evaluation.

QUESTION 5: WHAT NEEDS TO HAPPEN FOR POE TO BECOME COMMONPLACE?

Initial POEs need to be seen in a positive light

It was agreed that initial POEs must be seen in a positive light. For this reason, one authority had chosen to evaluate a school that was keen to participate in POE. It is also important for evaluation outcomes to be balanced, and not simply critical. One authority had tried to encourage participants in POE to accentuate the positive aspects of the building. For the report, they asked users to identify three positive aspects and three areas for improvement. POE in this authority has been well-received and a valuable attempt to build the evidence base for school estate investment.

POE must be made an essential requirement of school estate activity

A number of authorities felt that POE needs to be made mandatory for it to become commonplace. POE should become an integrated part of council procedure, or alternatively there should be a 'trigger point' around which to centre POE, such as the lead up to budget development. It was also suggested that it should be a standard item in the client's brief. Alternatively, it could be an integrated part of the School Estate Management Plan process to reflect on progress over the past year. However, it was also noted that if POE was made mandatory, it would risk turning into simply a 'box-ticking' exercise.

Benefits need to be demonstrated through sharing of good practice

POE outcomes must be made accessible to engage stakeholders, and be presented in such a way that they can influence decisions by other council departments such as Finance/Corporate Services, and by elected members.

There was also discussion around sharing the outcomes of POEs more widely, which could be promoted/facilitated by the Scottish Executive through benchmarking. In addition, there should be agreement on a 'fitness for purpose' standard in consultation with teachers and other stakeholders. One authority suggested that the Scottish Executive should set out a national policy which local authorities could adopt. Another authority suggested that the Scottish Executive issues 10 key points stating best practice for POE.

Funding has to be available

It was noted that POE activity was limited by current budget levels and that funding systems have to be flexible enough to allow for spending on POE. Funding needs to be included in project budgets, since these may be trimmed at the end of projects and POE may be dropped. One authority noted the importance of ring-fencing funding for an external party to undertake POE. It was suggested that such funding should be available from the Scottish Executive to include POE in the School Estate Management Plan.

It was noted that funding is also required to take action on issues raised in the POE exercise. If no consideration is given to the recommendations, stakeholders will lose confidence in the process. For this reason it was suggested that there may also be a need to set aside contingency funding in project budgets to deal with POE issues.

POE should be included in the training of building professionals

It was proposed that POE should be included in the training of building professionals to enable them to add value and to encourage standard practice. At present, there appears to be limited expertise and resources to conduct evaluations on a comprehensive basis.

CONTACT INFORMATION

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Note that further copies of this document and of the original *Evaluation* guidance (published in July 2004) are available from the Scottish Executive's School Estate website at www.scotland.gov.uk/schoolestate

APPENDIX 1 – LIST OF DELEGATES

Name	Title	Organisation
Andy Oliver	3Rs Project Manager	Aberdeen City Council
Graeme Traill	3Rs Education Adviser	Aberdeen City Council
Ean Mackie	Principal Architect	Aberdeen City Council
Mike Ramsay	PPP Team	Aberdeenshire Council
Douglas Beckett	Head of Professional Services	Angus Council
Ken Brown	Chief Architect	Angus Council
Ged Gilmartin	Principal Physical Resources Officer	Angus Council
Les Kerr	Principal Admin Officer	Argyll & Bute Council
Susan Brown	Estates Manager	City of Edinburgh Council
Lindsay Glasgow	Assett Planning Manager	City of Edinburgh Council
Chris McHardy	Service Manager	Dumfries & Galloway Council
Peter Nelson	Educ. & Community Buildings Officer	Dumfries & Galloway Council
Gillian Ross Pond	PPP Project Director	Dundee City Council
Gordon Currie	PPP Project Manager	East Dunbartonshire Council
Sandy McGarvey	Head of Operations Support	East Dunbartonshire Council
Maria Morris	Assistant Manager	East Lothian Council
Aileen Gardiner	PPP Assistant	East Lothian Council
Ken Milne	PPP Co-ordinator	East Lothian Council
Stewart MacKinnon	PPP Co-ordinator	East Lothian Council
Liz McLean	Projects Manager	East Lothian Council
Fiona Morrison	Head of Education Services	East Renfrewshire Council
Jim Wilson	Quality Improvement Officer	East Renfrewshire Council
Grant Robertson	Strategic Services Manager	East Renfrewshire Council
James McKinstry	Head of Educational Resources	Falkirk Council
Paul Gillies	School Estate Co-ordinator	Falkirk Council
Norman Cooper	Facilities Management Adviser	Fife Council
Jim Mather	PPP Council Representative	Fife Council
John MacLaughlin	Education Officer	Fife Council
Iain MacDonald	Pre 12 Strategy Co-ordinator	Glasgow City Council
Andrew Duff	Head of Buildings	Glasgow City Council
Gil Carruth	Monitoring Team Leader	Glasgow City Council
Brian Hemming	Estate Strategy Manager	Highland Council

Name	Title	Organisation
Tom Reid	Head of Education Service	Inverclyde Council
Andrew Gerrard	Project Manager	Inverclyde Council
Stuart Gillies	PPP Manager	Midlothian Council
Steven Small	Education Project Officer	Midlothian Council
Richard Donald	PPP Project Manager	Moray Council
Archie Ferguson	Quality Improvement Officer	North Lanarkshire Council
Ron Dufour	Education Officer	North Lanarkshire Council
Murdo Maciver	Head of Education Provision	North Lanarkshire Council
Brian Reid	Project Support Team	Perth & Kinross Council
Gillian Reeves	Project Support Team	Perth & Kinross Council
Maureen Watt	Project Support Team	Perth & Kinross Council
Jim Grimmond	SEMP Education Officer	Renfrewshire Council
Mike Clifford	School Liaison Officer	Scottish Borders Council
Jean Eager	ECLL Co-ordinator	South Ayrshire Council
Anne Kidd	Principal Officer PPP	South Ayrshire Council
Anne McNaughton	Principal Policy & Projects Officer	South Ayrshire Council
Charlie Sneddon	Support Services Co-ordinator	South Lanarkshire Council
Gordon Turnbull	Project Officer	South Lanarkshire Council
Joyce Wighton	Planning & Resources Manager	Stirling Council
Colin Wighton	Asset Management Officer	Stirling Council
Donna Adam	Strategic Resource Manager	West Lothian Council
Ross MacDonald	Asset Management Project Manager	West Lothian Council
Alan Edwards	Principal Architect	West Lothian Council
Niklas Bergstrand	School Estate Branch	Scottish Executive
Gillian McCabe	Schools Division	Scottish Executive
Fiona Munn	Principal Construction Adviser/Architect	Scottish Executive
Colin Reeves	Head of Schools Division	Scottish Executive
Brian Robinson	School Estate Branch	Scottish Executive
Les Scott	Architecture Policy Unit	Scottish Executive
Ken Smith	Construction Advice and Policy Unit	Scottish Executive
Katherine White	Assistant Economist	Scottish Executive

APPENDIX 2 – SUMMARY OF KEY POINTS RAISED IN GROUP DISCUSSIONS

In terms of current POE activity,

- › Most authorities have done/are doing some form of evaluation
- › Evaluation exercises are generally being conducted 'in-house'
- › Most evaluation exercises involve consultation with stakeholders

In terms of barriers to making POE a regular activity,

- › A lack of resources has constrained evaluation activity to date
- › A lack of experience and expertise is also an issue
- › The fear of criticism is a major issue for both clients and contractors

The benefits of undertaking POE include,

- › Allows 'fitness for purpose' to be assessed
- › Provides a good platform for stakeholders to air their views
- › Will help improve design quality
- › Assists in streamlining future procurement processes

In order for POE to be carried out successfully,

- › Commitment, clarity and leadership is required
- › Clients and participants must be prepared to accept constructive criticism
- › Facilitator needs to be neutral
- › Expectations of stakeholders need to be managed
- › The evaluation process should be comprehensive

For POE to become commonplace,

- › Initial POEs need to be seen in a positive light
- › Evaluation must be made an essential requirement of school estate activity
- › The benefits need to be demonstrated through sharing of good practice
- › Funding has to be available
- › POE should be included in the training of building professionals



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