



# Post Occupancy Evaluation - Definitions

Appendix 2

May 2022

# Post Occupancy Evaluation - Definitions

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<i>Accommodation Planner</i>	The person or entity responsible for the programming of required spaces and interpreting the <i>Ministry</i> needs, assessing requirements and identifying solutions and developing projects, in consultation with either the intended occupants directly or through a <i>Ministry</i> contact. Note may also be a <i>Project Manager</i> .
<i>School Boards (or Jurisdictions)</i>	School Boards whose capital projects are funded by the Alberta Government.
<i>Building Purpose Document</i>	The project summary (for offices or government facilities), that may include items such the stakeholders, project intent and scope, major change orders, inputs and reviews during the project timeline.
<i>Community</i>	The residents directly impacted by the facility.
<i>Construction Warranty</i>	Beginning with the date of <i>Substantial Acceptance of the Work</i> , the time during which faulty materials and workmanship must be corrected.
<i>Consultant</i>	The person or entity identified in the Agreement to perform the <i>Post Occupancy Evaluation</i> .
<i>Contractor</i>	The person, or entity with whom the <i>Owner</i> had contracted to construct the facility. May also be a Construction Manager.
<i>Designer</i>	The person or entity contracted under separate contract by the <i>Owner</i> and responsible for the design of the facility.
<i>Facility Management</i>	A broadly defined term that encompasses the following entities:
<i>Building Operator</i>	The <i>Property Manager's</i> employed person or entity responsible for the day-to-day operations of the facility.
<i>Caretaker</i>	The person or entity responsible for the interior cleaning of the facility.
<i>Certified Employee</i>	<i>Property Manager's</i> representative responsible for the administration of a <i>Property Management firm</i> (as applicable).

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<i>Facilities Manager</i>	The person or entity responsible for the overall management of a group of facilities.
<i>Operations Manager</i>	The <i>Property Manager's</i> employed person or entity responsible for the day-to-day management of the facility.
<i>Operations Supervisor</i>	The person or entity reporting to and assisting the <i>Facilities Manager</i> .
<i>Property Manager</i>	The person or entity responsible for the management of the facility.
<i>Site Maintenance Personnel</i>	The <i>Property Manager's</i> employed person or entity responsible for the day-to-day maintenance tasks of the facility.
<i>Family</i>	Relatives of the <i>Occupants</i> .
<i>Final Performance of the Work</i>	The point in time when the entire work, except those items arising from the provisions of warranty, have been performed to the requirements of the construction contract documents and certified by the <i>Designer</i> .
<i>Ministry</i>	The Ministry for whom the facility was constructed. Note may be the client or synonymous with <i>Boards</i> .
<i>Occupants</i>	The current individuals using the designated area(s) within the facility, which may include the public and who may use the facility on a permanent, short or long-term basis.
<i>Occupancy Permit</i>	Permit provided by authorities having jurisdiction indicating that the Municipality's requirements have been met and the facility could be occupied.
<i>Owner</i>	The entity for whom the facility was constructed or is now under their responsibility. Typically this would be referred to as "The Province", as represented by the Minister of Infrastructure, or other as designated in writing. Terms such as "Province", "Crown", "Alberta Infrastructure", "Department", or "Minister" are synonymous with <i>Owner</i> .

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<i>POE Coordinator</i>	The person or entity responsible for the management of the Post Occupancy Evaluation.
<i>Post Occupancy Evaluation</i>	Post Occupancy Evaluation evaluates all aspects of occupied facilities, typically after <i>Construction Warranty</i> expires but no later than 12-18 months after the <i>Occupancy Permit</i> has been issued. Its purpose is to continually improve facility planning, design and delivery. This evaluation documents the performance of integral parts of the facility: its functionality, and how the building meets facility-user needs, activities and goals.
<i>Project Manager</i>	The person or entity that was designated by and responsible to the <i>Owner</i> , for the management and delivery of the design and construction of the facility.
<i>Recommendations</i>	A set of suggestions, specific to the facility studied, provided by the consultant to improve the functionality of the facility. They are to be categorized into the following:
<i>Immediate</i>	Life safety and Code items that should be attended to immediately.
<i>Short Term</i>	A snap shot of minor physical and functional items, that can be corrected with minimal or no cost implications within 12 months after the POE report is completed.
<i>Medium Term</i>	Items that can incorporated into the current facility, but with some possible re-design and larger cost (and time) implications that exceed normal operational and maintenance thresholds. Examples may include modifications to building components or site changes. Timeline is 13 to 48 months after the <i>POE</i> report is completed.
<i>Long Term</i>	These are items for future design considerations and are those that would likely require a major modernization to complete. These opportunities have no timeline.
<i>Substantial Performance of the Work</i>	The point in time when the <i>Designer</i> verified that the work was more than 97% complete and could be used

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	for the purposes intended. Could be synonymous with <i>Interim Acceptance of the Work</i> .
<i>Tenant</i>	A person or entity leasing space within a facility.
<i>Total Performance of the Work</i>	The period of time when the entire work including those items arising from the provisions of warranty has been performed to the requirements of the construction contract documents and has been certified by the <i>Designer</i> .
<i>Work</i>	The total construction and related services required by the <i>Designer's</i> construction documents.