

P22 Pre and Post Occupancy Evaluation Toolkit

“The NHS is committed to providing best value for taxpayers’ money and the most effective, fair and sustainable use of finite resources.” This is one of the seven key principles set out in the NHS Constitution to guide the NHS (and thus NHS England) in all that it does.

To achieve this Business Cases are structured to enable assessment and appraisal of their content to be carried out in accordance with the Five Case Model (HM Treasury, 2007) for business case development, i.e.:

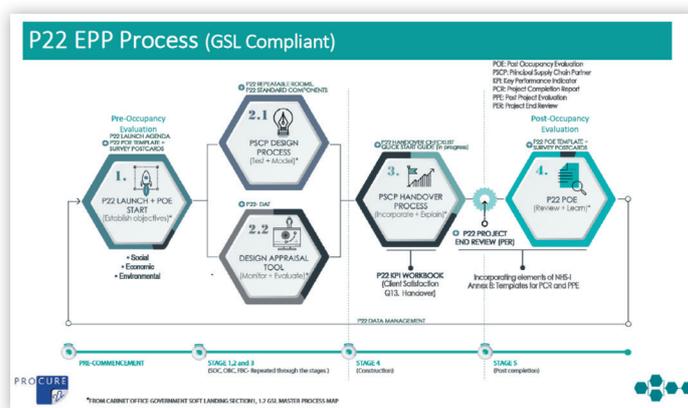
1. Strategic Case – to demonstrate that the proposals are supported by a robust case for change;
2. Economic Case – to demonstrate the options appraisal of potential benefits compared to costs, and that value for money has been optimised;
3. Commercial Case – to demonstrate that the proposals are commercially viable;
4. Financial Case – to demonstrate that the proposals are financially affordable;
5. Management Case – to demonstrate that the proposals can be delivered successfully.

Post-Occupancy Evaluation (POE) is used to inform evidence-based design (EBD) to meet the requirements of the Five Case Model.

However, while POEs have been part of the process for many years the 6 P22 Principle Supply Chain Partners (PSCMs) identified a need to provide a POE Toolkit that provides for:

- Standardised POE methods and metrics aligned with NHS Improvements Model Hospital;
- Findings/conclusions that are widely accessible;
- A focus for technical performance and not outcomes related to patient-centered care;
- Lessons learned accessible to all.

In line with these National and Local Strategy drivers, the PSCMs have developed a Government Soft Landings (GSL) compliant Pre & Post Occupancy Evaluation toolkit, to capture Outcome measures across a range of areas, which the built environment can influence and support.



The metrics support ‘before’ and ‘after’ comparison of the Healthcare development, across both new build and refurbishment schemes.

The Pre OE is carried out as part of the Project Launch recording the current data for the facility to be replaced, extended or improved. This data is used to inform the Design and Handover process to ensure that the business case benefits are achieved.

Additional benefits

Captures and defines as existing baseline measures.

Defines development targets and outcomes.

Proactive tool for testing briefing and design development decisions against.

Records actual performance against targets in years 1, 2 and 3 post occupancy.

Standardises the measures across all P22 schemes, to support benchmarking, analysis and shared learning.

Service specific sections tailored to record Staff and Patient experience together with Service Outcomes.

Creates a transparent and accessible resource for the team to track and monitor.

Aligned with NHSE+I Business Case Requirements.

Aligned with the ERIC returns and Moel Hospital metrics.

Supports challenge during the briefing and design stage to ensure Benefits are realised.

Supports Evidence based Design.

Delivers exemplar scheme identification and shared learning based on actual outcomes.

Post OE is carried out at 12, 24 and 36 months after handover to record the same comparable data and record the actual benefits being delivered.

The metrics support 'before' and 'after' comparison of the Healthcare development, across both new build and refurbishment schemes.

The associated Staff and Patient/Carer Survey Postcards align with NHS England's Business Case Requirements Checklist capture feedback after occupation of the new facility.

The P22 POE Toolkit is structured as follows:

• **Pre & Post Occupancy Evaluation Overview Summary – Appendix 1.**

Provides the executive summary covering lessons learnt with key comments & feedback.

• **Page 1 – Project Measures – Appendix 2.**

Aligned with the NHS Model Hospital, Estates and Facilities reporting requirements and GSL measures.

• **Page 2 – Service Specific Measures – Appendix 3.**

Patient & staff experience, service performance outcomes and other agreed measures.

• **Page 3 – Project/Service Specific Commentary – Appendix 4.**

Completed following analysis of the feedback highlighting any abnormal and external factors influencing the evaluation.

Patient & staff experience measures are captured using Patient/Carer & Staff Postcards that can be completed on-line or as hard copies. Results are presented in a Postcards feedback report. – **Appendix 5**

A number of **Service Specific Measures templates** have been completed and this is a growing library as new Projects provide templates for additional services.

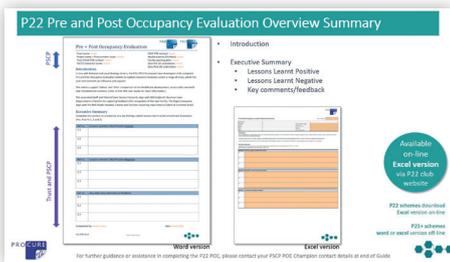
All of the templates for the P22 POE Toolkit are available, along with a user Guide, on the P22 Club website. This website will also provide access to the Pre & Post Occupancy Evaluation Overview Summary for all Projects to provide sharing of lessons learnt and continuous improvement via Project Share.

Using the toolkit the PSCMs are facilitating the Pre and Post Occupancy Evaluations on all P22 Projects and have made the toolkit available for use on projects outside the Framework. This will provide consistent POE data on 200+ healthcare facilities.

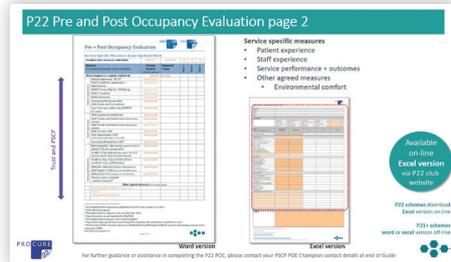
We believe this provides a source of relevant and comparable evidence based data never before available within the NHS.

It has been said by Government representatives that this level of collaborative working “will bring huge benefits to the NHS” and “is a first . certainly, and exemplar”.

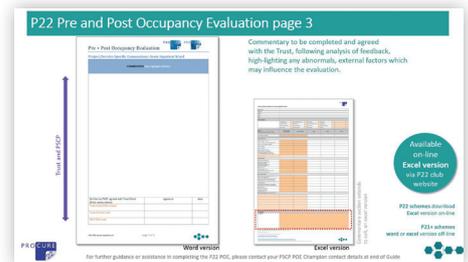
Appendix 1



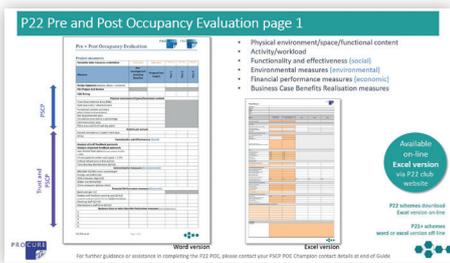
Appendix 3



Appendix 4



Appendix 2



Appendix 5

