State of New Mexico
Public School Facilities Authority

Post Occupancy Evaluation Handbook

For New Construction, Remodel, High Performance, and Existing Projects

October 10th, 2014

RECORD OF CHANGES

Each page of the *Post Occupancy Evaluation Handbook*, including the table of contents, introduction, and appendices bears a heading that indicates the PSFA publication date for the entire document. Changes may be made by PSFA to any portion of the document at any time and may include simple modifications of text, or the deletion or addition of entire sections. PSFA will list each change on the RECORD OF CHANGES spreadsheet below. A changed section, article, paragraph, sub-paragraph, or table is marked with a corresponding single, vertical line appearing in the left-hand margin opposite the change. The number and date designated to the most recent change in the document will appear under the publication date on each page of the entire document. When a significant amount of recorded changes are accumulated within the document, PSFA will re-issue an entire new version with a new publication date.

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Change No.	Date	Location / Description

POST OCCUPANCY EVALUATION HANDBOOK

NEW MEXICO PUBLIC SCHOOL FACILITIES AUTHORITY

Table of Contents

A. INTRODUCTION

a. This PSFA Post Occupancy Evaluation (POE) Handbook, referred to throughout as the "Handbook", is an outline of the goals, criteria, and proposed methodology for Post Occupancy Evaluations to be performed on public school facilities as commissioned by the Public School Facilities Authority (PSFA). Those facilities include new and existing public school facilitates, facilities that incur a remodel, and facilities that qualify as High-Performance (HiP) Projects.

b. The scope of work outlined in the Handbook details the entire POE process from the selection of one or more consulting Evaluators and Sub-contractors to the summary of deliverables. The Handbook is written as a chronological outline to guide both the Owner and Evaluator through the full POE process in a step-by-step manner. Details and directions for completing each phase of the POE are outlined in their respective sections. Any amendment or divergence from this POE Handbook will be discussed and approved by the Owner and Evaluator during the Planning phase of the prospective POE.

c. Revisions to the POE Handbook will be noted on the Record of Changes page as they occur. It is the Evaluator's responsibility to use the most current version of the Handbook and to check for revisions prior to submitting a proposal for a POE.

B. GLOSSARY OF TERMS, DEFINITIONS, & CAPITALIZATION

For purposes of this Handbook, the following terms, definitions, and capitalizations shall apply throughout and to all attachments incorporated herein, unless otherwise noted:

a. **Adequacy Planning Guide, Adequacy Standards:** The companion document to the Public School Capital Outlay Council Statewide Adequacy Standards (6.27.30 NMAC) provided by the state of New Mexico for use in the programming and design of new projects to meet adequacy (document available at **www.nmpsfa.org**).

b. **Agreement:** The Agreement Between the Owner and the Evaluators applicable to the Project.

c. **Awards Project Efforts:** New Mexico Public School Facilities that have received funding from the PSCOC and PSFA for new construction, remodels, repairs, and other improvements that are subject to future Post Occupancy Evaluations.

d. **Comprehensive Programming Investigations (CPI):** The CPI is the second level of investigative detail to be employed by the Evaluator. It is a focused exploration of specific critical questions.

e. **Design Professional (DP):** The legal entity qualified to do business in the State of New Mexico that performed the architectural, landscape, interior, space, engineering, information technology, or other design strategies constructed at the site selected for the POE.

f. **Education Performance Statistics (EPS):** Any relevant performance-based education statistics specific to a Facility or district as outlined by the New Mexico Public Education Department. For example, Annual Yearly Performance (AYP) data released by the individual school or district revealing the previous years performance levels in Math and Reading across different grade levels and demographic variables.

g. **Education Specifications:** The pre-design document issued to the DP by the PSFA outlining all required elements of the Facility.

h. **Energy Performance Modeling (EPM):** Digital and analogy models projecting various energy consumption scenarios used in the design phase to more accurately predict and design for a desired level of energy efficiency.

i. **First Response Investigations (FRI):** The FRI is the first and most general level of investigative detail to be used by the Evaluator.

j. **(POE) Evaluator:** The legal entity qualified to do business in the State of New Mexico that employs an individual or individuals who will perform the investigation or investigations outlined within the Agreement. Will also be known as the Evaluator.

k. **Facility:** The school building, buildings, complex, or campus that is the focus of the Post Occupancy Evaluation.

l. **(POE) Handbook:** This document. The manual for conducting a POE outlining the goals and methodology of the investigation. The Handbook is considered part of the Contract of Work between the Owner and the Evaluator.

m. **High Performance School Facility Design (HiP):** A HiP School Facility is one that achieves a minimum delivered energy performance standard of one-half the U.S. energy consumption for school buildings as defined by the U.S. Department of Energy. This must be accomplished without jeopardizing any other essential standards and guidelines administered by the New Mexico Public School Facilities Authority.

n. **Lead-Off Survey:** The initial online survey administered to the Users. The data will be analyzed by the Owner and Evaluator to focus the POE Investigation.

o. **Life Cycle Cost Analysis (LCCA):** Life cycle cost analysis (LCCA) is a method for assessing the total cost of Facility ownership. It takes into account all costs of acquiring, owning, and disposing of a building or building system. LCCA is especially useful when project alternatives that fulfill the same performance requirements but differ with respect to initial costs and operating costs and have to be compared in order to select the one that maximizes net savings. A full outline of the LCCA is included in section D. c. ii. Costs.

p. **Long-Term Performance Investigations:** The third level of investigative depth to be performed by the Evaluator and is aimed at establishing metrics for long-term analysis.

q. **On-Site Investigation (OSI):** The period in which the Evaluator will be on site at the Facility performing the POE. This involves interacting with Users and observing the normal school day in action. The POE chronology centers on this period.

r. **Owner:** The Owner, when referred to as if singular in number in this Handbook shall be interpreted as meaning both the School District and the Public School Facilities Authority (PSFA).

s. **Post Occupancy Evaluation (POE):** The systematic investigation of a Facility to determine the success or failure of one or more design elements within the project to be performed by a third party Evaluator after the User has occupied the Facility.

t. **PSFA:** Public School Facility Authority. The state agency of New Mexico responsible for managing public school facility funding and construction. The agency responsible for executing the POE. The PSFA is considered an Owner.

u. **Regional Manager (RM):** PSFA project manager assigned to the District and representing PSFA on the project. The RM will be the liaison between the Owner and the Evaluator.

v. **User/Users:** The primary occupants of the Facility such as Students, Staff, and Faculty as well as secondary occupants such as Parents, Community Members, Local Business Owners, Voters, or any other group with a legitimate stake in the Facility, its funding, or its operations.

C. SUMMARY OF THE OWNER AND EVALUATOR DUTIES

The Owner and the Evaluator will be responsible for the following duties:

a. The Owner will write and will be ultimately responsible for dispersing and collecting a Lead-Off Survey to the User populations for preliminary POE data.

- The Lead-Off Survey will allow the Owner and Evaluator to focus their attention on specific issues at the Facility.

b. The Evaluator will investigate the POE Goals and Objectives as described in the Handbook **Section D**.

- It is the responsibility of the Owner to brief the Evaluator on the scope of PSFA investment within the Facility and its status as a HiP or Non-HiP Facility. It may not be necessary to perform a full POE if only a small part of the school received PSFA funding. An example of this may be if a particular Facility received PSFA funding for a new addition such as a gymnasium. In this situation the Owner may only be interested in performing a POE on the gymnasium.

c. The Evaluator will perform the POE using the Method described in **Section E**.

- Section E chronologically outlines the Pre-Planning, Planning, Conducting, Summary and Deliverables of the POE. Any alterations to this process will be discussed and approved by the Owner and Evaluator during the Planning Phase.

- Section E outlines three (3) levels of investigative depth and seven (7) possible investigative tools to be used when performing the POE at the Facility during the OSI. It is the responsibility of the Owner and the Evaluator to decide together which tools are appropriate for the specific Users and Facilities under investigation. An example of this may be when and where it is deemed appropriate to use photography.
- The Evaluator is required to attach a *Preliminary Narrative of Approach* to the proposal for services related to the POE if their proprietary POE Methodology differs from the processes described in this Handbook. This narrative will describe their process, methodology, additional time, tools, resources, and consultants that the Evaluator feels are required to accomplish the POE Goals and

Objectives. The Evaluator shall present this narrative to the Owner for approval.

- The Evaluator will describe their experience in relation to the POE process and offer recommendations that can be applied to future implementation of this program.

D. POST OCCUPANCY EVALUATION GOALS AND OBJECTIVES

The key purpose of the Post Occupancy Evaluation is to investigate, analyze, qualify, and report on the successes and weaknesses of the school design and construction for future replication or repair.

In order to quantify the success or weakness of the Awards Project Efforts, targeted Post Occupancy Evaluations of completed projects based on clearly defined objectives will cover three main tasks:

a. **Task A:** Analyze the overall process as well as the systematic design approach used on the Facility. A full review of the DP's process, a review of all pre-design input from the future Users (i.e. teachers, students, faculty, community members, etc.), a review of any modifications or negotiations that took place between the Owners and the DP, and any architectural issues that arose during the construction phase will be required.

    - In the case of a HiP Facility, the Design Professional incorporated an *Integrated Value Analysis & Design* approach. This required that additional time and resources were spent up-front at the conceptual phase and continued as needed through design and contract documents. A high level of coordination and communication between project team members, including Owner and PSFA was needed. Additional expertise in specialized fields was required in order to analyze concepts and develop proper design solutions to meet the project goals. The POE will evaluate what successes and weaknesses arose from these additional design investigations.

b. **Task B:** Evaluate the effectiveness of the design-modeling tools, additional consultants, and extra resources used to achieve design objectives. This will include the review of Energy Performance Modeling, Life Cycle Cost Analysis, Acoustic Analysis and any other environmental estimates or projections made during the design phase.

    - In the case of a HiP Facility, the PSFA (who are advised by the State of New Mexico High Performance Schools Task Force) administer this program intended to produce sustainable school building projects in the state of New Mexico. The primary program goal is to achieve a minimum delivered energy performance standard of one-half the U.S. energy consumption for school buildings as defined by the U.S. Department of Energy. This must be accomplished without jeopardizing any other essential standards and guidelines administered by the New Mexico Public School Facilities Authority. The POE will investigate how these energy standards influence the successes and weaknesses of the Facility. To accomplish the project

goal, the HiP project Design Professionals were required to utilize the following tools for design development.

a. **Energy Goal Calculator:** *Target Finder*, available at www.energystar.gov shall be the instrument used to find the energy performance rating for a similar school building in the Facility's location as defined by the U.S. Department of Energy.

b. **Modeling Software:** Required to study various aspects of the design, which relate to the proposed energy savings and environmental features of the Facility. A model is also required to evaluate day lighting. Other studies may be requested by the Owner or justified by the Design Professional as necessary to the Facility's success. Energy modeling requirements include the following:

i. *Characterization of energy use:* Energy use characterization gives the team an understanding of where energy is being used in the facility, and where the greatest savings are possible. This information is presented in pie charts that describe energy cost and energy consumption by end use (e.g. heating, cooling, plug loads, ventilation, etc.).

ii. *Development of Energy Conserving Measures (ECM's):* ECM's are developed and evaluated for each to provide an estimate of the potential impact on energy use and peak load.

iii. *Energy analysis of at least 3 preferred schemes:* The individual ECM's are bundled together to produce at least 3 schematic options. Each of the schematic options is then modeled so the interaction between the various measures can be understood.

iv. *Revised energy runs:* As the design is refined and finalized, revised energy runs are needed to track the energy performance of the design. Up to three (3)

revised energy runs are included in the basic energy modeling scope.

c. **NOTE:** A Performance Assurance Contractor was assigned to the Project as an Owner's consultant as part of the PSFA *HVAC & Controls Performance Assurance Program*.

c. **Task C:** Evaluate how the overall design of the Facility has impacted its Users through the use of POE Investigative Tools in the following areas:

i. **Educational Mission:** Establish a baseline set of metrics for the identification and measurement of changes related to Educational Performance Statistics within the Facility and determine which can be attributed to the design and to what degree. These could include for example graduation rates, testing for Annual Yearly Performance, or attendance rates.

- School design must be guided primarily by purpose of the Facility, which is to house and effectively deliver an educational program that achieves student learning. This must be the most important criterion for the study, and the measurements used should be as clear and valid as possible. The results identified by the study will largely determine the value of the school's design in the eyes of the Users and decision makers such as school boards, voters, and students.

- For the evaluation of a HiP Facility, the Evaluator will investigate if and how the energy efficient features have impacted the educational program, user comfort, and overall learning environment. Also, the Evaluator will investigate if and how the Facility Users were trained in the operation of such features and the effectiveness of the training.

ii. **Costs:** Measure the actual cost of designing, constructing, maintaining, and operating the Facility through the first year of occupancy and establish a framework for continued measurement through the first 30 years of occupancy. Compare actual energy consumption data to preliminary LCCA expectations, energy modeling forecasts, as well as available average costs of similar facilities within the school district and or within proximity. Identify which cost differentials can be attributed to specific design

decisions and to what degree. Make recommendations for future adjustments if necessary.

- For many Facilities this will be the first POE performed. The initial POE will help set the framework for conducting a systematic and periodic analysis of building system performance as compared to the results anticipated by the LCCA. Outcomes to be determined by the study will include but may not be limited to:

  a. Operational cost per square foot and per occupant.

  b. The difference between actual operation costs and expected operational cost.

- When Performing a POE on a HiP Facility specific design factors will be evaluated and compared to pre-design expectations. Those factors will include but are not limited to:

  a. **High Performance Building Envelope:** Evaluate the options that created a high performance envelope including features that may have gone beyond code-required levels.

  b. **Energy efficient lighting:** Evaluate the options that utilize day lighting, energy efficient electric lighting, task-ambient lighting and controls such as daylight dimming and occupancy sensors. Evaluate the savings of energy consumption and reduction in the cost of mechanical systems that may have resulted. Also evaluate the maintenance and periodic replacement cost of these options.

  c. **Mechanical system selection:** Evaluate the actual costs of the chosen mechanical system to the predications in first cost and life cycle value. Also evaluate the maintenance and periodic replacement costs of these options.

  d. **Materials durability:** Evaluate the Facility cladding and roofing to determine the relationship between the predicted first cost and life cycle value to the actual. Also evaluate the

maintenance and periodic replacement costs of these options.

e. **Sustainability:** When evaluating a HiP Facility, the Evaluator will also consider construction efficiencies of such things as material sourcing, transportation costs, and environmental impacts.

f. **Other elements:** Additional factors may include water conservation, use of sub-metering, site-specific and regionally appropriate energy sourcing and generation, and total reduction in operational cost.

iii. **Health, Safety, and Security:** Evaluate how the school's design, construction, and operation impact the health of the Users. The POE will identify any impact caused by design features on school safety and security. Example might be the effects of interior sight lines on safety and security, or IAQ issues resulting in chemical sensitivities or asthma.

- It is naturally assumed that a new Facility will typically conform to all applicable codes, standards, and guidelines, and will achieve the minimum required standards for health, safety, and security. It is not intended, however, to build a Facility that meets only minimum requirements. The mission of the PSFA is to exceed the level of basic quality suggested by regular building codes, design guidelines, and Adequacy Standards, particularly in the area of environmental health, safety, and security.

- When performing an evaluation on a HiP Facility the investigation will include Acoustics in conformance with ANSI S12.60 and Indoor Air Quality (IAQ) as well as any other specific environmental factors relevant to the study.

iv. **Function, efficiency, and flow:** Qualify the functionality, efficiency, and flow of the Facility design and determine the level of success achieved by specific design solutions incorporated into the Facility. Various criteria might include (but is not limited to) occupant comfort, operability, controllability, maintainability, convenient circulation, ergonomics, improved Education Performance Statistics (EPS), and conservation of time

and resources. The Evaluator will determine any direct or potential impact on district and PSFA standards and design guidelines, particularly in terms of space and building system requirements.

- School Facility planning and design guidelines from the district or state may already provide basic direction for the design professional on the project.

v. **Psychological, social, and cultural:** Identify the design characteristics that effect the psychological, social, and cultural environments at the Facility. Establish the value of these characteristics through data collection methods and compare results to any published research addressing the relationship of educational design to these behavioral factors. Responses to these characteristics may help to analyze building comfort and overall perception of the Facility by the Users.

- Schools are usually not homogeneous by nature, neither within nor in relation to other schools. A good school design will take into consideration the uniqueness of the population served while striving to support a positive psychological environment throughout.

E. POST OCCUPANCY EVALUATION METHOD

There are four (4) phases of the Post Occupancy Evaluation process. Each phase is time-sensitive as there is a critical window for both reliable data gathering and minimal student disturbance that must be adhered to during the POE. The POE timeline centers on the two to three weeks (approximately) that the Evaluator will be on site at the Facility collecting data from the Users and, in some cases, disrupting the normal flow of the school day. This is why the POE timeline must be strictly adhered to. We will refer to this two-week period as the On-Site Investigation period or OSI. We must try to limit the intrusiveness the POE Process and the OSI on the educational mission of the facility. Complying with the POE timeline is the best way to not disturb the students.

a. **Pre-Planning: Evaluator Selection, and Preliminary Survey:**

2 months before OSI

i. An initial Pre-Planning meeting with representatives of all User and Owner groups will occur to discuss the POE Process. A tentative schedule will be discussed, revolving around an OSI that is suitable for the Facility. The PSFA will release the Lead-Off Survey (LOS) to the User Groups for preliminary data collection.

- During the Pre-Planning phase the Owners will administer a LOS to the User Groups. The purpose of this survey is to gather preliminary data to be used as a guide for the Owners and the Evaluator during the Planning phase. This survey is internet-based and will be released to the User Groups while the Evaluator is being selected. The Owners will attempt to solicit responses until at least 60% of the User population has submitted data or for three weeks, which ever comes first. The LOS is online and is maintained by the PSFA. The LOS is dispersed via web link and email with the assistance of a District IT Representative (from the school under investigation). The LOS data must be gathered and made ready for analysis at the upcoming Planning meeting or meetings.

- Currently there are seven defined user groups with seven pre-written surveys available for dispersal on our Zoomerang.com account. Those User Group surveys include:
  - *a.* Students
  - *b.* Teachers
  - *c.* Parents
  - *d.* Support Staff and Administration
  - *e.* Maintenance and Facilities Management
  - *f.* Community Members and Neighbors
  - *g.* Design and Construction Team.

- Currently each survey is Active and could be made ready for dispersal with only minor adjustments. Each survey has its own URL. To disperse the Lead-Off survey:

a. Review the "Zoomerang Lead-Off Survey" Power Point presentation or PDF available from the PSFA.

b. Edit, rename, and adjust each survey to meet the needs of the investigation. Once complete, Zoomerang will generate a new URL for the survey.

c. Contact the District IT Representative and forward him or her an organized list of the links. Be sure to label each link with its User Group so they do not get confused. In some cases each link may be posted on different websites. You should have previously discussed with the District IT Rep where each link would go. Include that list with your forwarding of the links. That list may look like:

i. Student survey link to be posted on School website.

ii. Teacher, Support Staff / Admin, and Maint. / Fac. Mgmt links will be emailed directly to all staff with a district issued email address.

iii. Parent and Community Member links will be on the District website. Letters sent home with students or other means to be determined would notify these users.

d. The Design and Construction Team survey is the responsibility of the PSFA. Consult the facilities project manager for a list of contacts on the project and email those involved directly.

e. Once a significant number of responses have been received or the 3-week window has ended, the PSFA will close the surveys. During the remanding time between the end of the survey and the Planning Meeting the results need to be tabulated, analyzed, and printed for review and the Planning Meeting.

ii. The PSFA will select an Evaluator to execute the POE during the Pre-Planning Phase while the LOS is active.

b. **Planning:**

1 month before OSI

The Planning phase will begin with a Planning meeting once an Evaluator has been selected and the LOS responses have been compiled for review. In this phase the specifics of the investigation will be discussed by the Owners and the Evaluator:

i. The schedule will be determined.

ii. The status of the Facility will be discussed. Specific areas of interest for the POE will be outlined as guided by the LOS. The investigative tools to be used during the OSI will be determined and scheduled.

iii. Our goal is to produce a POE data set that is comparable across different districts and regions of New Mexico. However, our state is as economically, culturally, and environmentally diverse as it is geographically. For this reason the Evaluator must recognize that the Owner wishes to develop a matrix format that allows for an "Apples-to-Apples" comparison of POE results against other Facilities. This matrix format will be discussed in terms of compatibility with the PSFA's goals.

iv. Necessary permissions and access to pertinent information (both public and private), i.e. DP design archives, personal student performance information, or Facility maintenance records, will be made available to the Evaluator by the Owner.

c. **Conducting:**

The OSI = 2 weeks

This is the On-Site Investigation (OSI) phase of the POE. The RM will make themselves available to the Evaluator and the Owner to facilitate any questions, clarifications, or modifications to the investigation outlined in the Planning phase. In addition to the investigative tools outlined and defined below, the Evaluator will perform the investigations at a specific level of depth (to be determined by the Evaluator when pertinent data becomes available). The investigative tools are to be used in this chronological order by the Evaluator:

i. **Archival Research:** The Evaluator is required to conduct a full review of the available pre-design documentation of the Facility. This will include but is not limited to the DP archives such as design documents, any documented input from the Users gathered at (Facility) pre-planning workshops or charettes, and any relevant guidelines and handbooks such as the Educational Specifications or Standards and Guidelines provided by the Owner. It is the responsibly of the Owner to provide or make any necessary arrangements for the Evaluator to gain access to the desired information not in the Owners possession.

ii. **Observations:** The Evaluator will be responsible for conducting observational research at the Facility. This will consist of independent Observations of the Facility in use and will also be employed during the Walkthroughs. The Evaluator is required to codify and summarize the results of the Observations for the final report.

iii. **Interviews:** The Evaluator will conduct Interviews in the form of focus groups and one-on-one discussions with representatives from the User groups at the Facility. It is the responsibility of the Evaluator to devise a strategy for recruiting an Interview sample population that conforms to accepted practices of statistical data gathering techniques.

iv. **Walkthroughs:** The Evaluator will conduct Walkthroughs throughout the Facility accompanied by a number of representatives from the User groups. The Walkthrough can be used as a tool to assist in the Observation and Interview phases of the investigation. The Evaluator is required to codify and summarize the results of the Walkthrough for the final report.

v. **Energy Performance Measurement:** The Evaluator will analyze utility bills, perform actual meter readings, and utilize any additional instrumentation to monitor energy use.

vi. **Photography:** Photography is a critical tool in the Post Occupancy Evaluation. The Evaluator will be required to use Photography as a primary documentation tool in the Observation and Walkthrough phases of the investigation to support their findings. It is the responsibility of the Owner to prepare all necessary legal approval and permissions for the Evaluator to conduct Photography of the Users within the Facility.

vii. **Other(s) as negotiated and mutually agreed to before or during the contract:** The Evaluator and the Owner will decide upon any other investigations deemed necessary to the project during the Planning phase or during the Conducting phase if needed. In some cases the Owner may have previously collected information that may be pertinent to the Evaluator's investigation, such as additional internet-based or paper-based Surveys. The Owner will provide relevant information to the Evaluator as deemed necessary.

The Evaluator will perform their investigations at a specific level of depth, to be determined when issues and pertinent data become available. Some issues that arise during the POE will be relatively easy to fix while others will be more complicated and will require more time and investigation. To account for this we defined three (3) levels of depth to be used by the Evaluator when investigating issues:

- **First Response Investigations (FRI):** The FRI is the first and most general level of investigative detail to be used by the Evaluator. This level is relatively quick and easy. It provides an overview of opinions, use patterns, general flow, etc. and allows the Evaluator to begin to understand where successes and weakness may be concentrated. The Evaluator will conduct First Response Investigations using the seven (or more) investigative tools and will compile a report of their findings. Once identified, areas of specific success or weakness requiring further investigation will lead to level 2, the CPI.
- **Comprehensive Programming Investigations (CPI):** The CPI is the second level of investigative detail to be employed by the Evaluator and is aimed at exploring specific critical questions. Once the FRI have been conducted and specific areas of success or weakness have been discovered, the Evaluator will begin the more thorough investigations into the causes and effects of those successes and weaknesses. At this level the Evaluator can begin to document and summarize those areas of success for future replication. In the event of discovering a programming weakness the Evaluator may compile data for documentation to submit to the Owner for future remediation and recommend possible solutions for the issue.

- **Long-Term Performance Investigations (LTPI):** As stated it is the duty of the Evaluator to not only investigate potential issues that may have an affect on performance statistics (educational,

environmental, and otherwise) but to also lay the framework for the Owner to establish a continuous improvement process for analyzing these relationships over the life of the Facility (see section E.b.iii). For these types of issues the Evaluator will use the LTPI. Once a particular programmatic element has been identified as successful and reproducible, the Evaluator will suggest a methodology for performance measurement over the life of the facility.

d. **Summary and Deliverables:**

1 month after OSI

Once the investigations are complete the Evaluator will have a pre-determined time period to summarize their findings, compile their final reports, and to return all loaned archives to the Owner. The Evaluator shall produce the following to the PSFA in the form of deliverables under the terms of the Agreement:

i. 2 DVD data discs of the full report (at both 95% and 100% completion of the POE).

ii. 4 hard copies of the final report, bound in 3-ring binders (at both 95% and 100% completion of the POE). These copies will be made available to the PSFA, PSCOC, the State of New Mexico HiP Task Force, and the administration of the Facility being investigated.

iii. Perform a maximum of 3 formal Power Point (or equivalent, format to be approved by PSFA during the Planning phase) public presentations of the final report (electronic copies of presentation must be included on the DVD).

iv. The creation of a database for future performance statistic comparisons to be carried out by the owner. This could be in the form of a spreadsheet or other data-summarizing file.

F. POE SCHEDULE TEMPLATE

#	Date	Pre-Planning	Planning	Conducting	Summary
1		Pre-Planning meeting			
2		Lead-Off Survey			
3		Evaluator selection			
4		Collect survey data			
5			Planning meeting		
6			Survey review		
7			Schedule for OSI		
8			Permissions obtained		
9				Execute OSI at the	
10				Facility	
11					Prepare report
12					
13					
14					Deliverables

Notes:

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