LEARNING FROM OUR WORK

A summary of the session presentation for ASLA, 2015

Tim Peterson, Principal :: SWA Group
Justin Winters, Associate :: SWA Group
Christopher Hardy, Associate :: SWA Group
LEARNING OBJECTIVES

• Identify the role of Post Occupancy Analysis (POA) in contemporary practice, including cross-discipline analysis.

• Discuss the benefits of POA as a tool to improve practice, including performance, maintenance, and social considerations.

• Discuss the challenges - logistically, morally, and legally - regarding the collection of this data.

• Share the different research methodologies and related project typologies employed at SWA.

• Share SWA’s strategy for design-life-cycle integration into future project work.
CONTEXT

• Current practice includes 213 employees in 7 offices.
• Over 13,400 project contracts in 92 countries since 1957.
• SWA has the benefit of full-career leaders who have observed their early work mature over their lifetimes.
• SWA diligently tracks and catalogs all projects to project completion.
• With all of this data available, how can we access the embedded knowledge and lessons to better inform the next generation of professionals?
• In 2013 the SWA Post-Occupancy Initiative was established to explore how past work can inform our current practice and future design—formally extending project review beyond completion.
MOTIVATION

SOCIAL SYSTEMS
- Each design is a social experiment
- We predict how people will use a space
- POA allows us see how things really turn out

NATURAL SYSTEMS
- Landscape architecture happens in a multivariable system
- Natural systems are difficult to construct, predict, and maintain
- POA enables us to learn how our designs evolve over time

ECONOMIC SYSTEMS
- Public space can have a huge economic impact on a development
- Economic metrics help advocating for investment in public space

DESIGN
- We always want to improve our design practice.
- Being better informed of the implications of our decisions will result in better designs
THREE METHODOLOGIES

**DO**  
**Direct Observation**
- Data gathered through visiting the site and visually evaluating how the materials and details have held up over time.
- Photographic comparison of how the site has matured since construction.

**IK**  
**Institutional Knowledge**
- Qualitative information gathered through interviews and discussions with people who worked on the design and construction of the project.
- Anecdotal information also gathered from interviewing key stakeholders, such as the original client, municipality directors, or facility manager.

**DPA**  
**Design Performance Assessment**
- Empirical data with a clear methodology that can be used for analysis.
- Measures for the removal of bias are key to the analysis being verifiable.

**Resource Investment**
- **Modest Resource Investment**
- **Moderate Resource Investment**
- **Greatest Resource Investment**
POA RECOMMENDED TEAM STRUCTURE

Recommended Three-Person Team:

Staff or Intern (50%):
- Background research
- Data collection/surveys
- Interviews with users

Associate or Mid-Level (35%):
- Background research
- Site visits/surveys
- Interviews with users and clients
- Report writing
- Managing deliverables

Principal or Senior-Level (15%):
- Shares project history and intent
- Site visits/design assessment
- Interviews with clients & officials
COMMUNICATION

EXECUTIVE SUMMARY FOR PRINCIPALS AND FIELD GROUP
• Boiling down the data to key lessons can be distributed immediately to decision makers to best inform current designs.

INTERNAL REPORTS
• Internal reports are provided to all staff for complete lessons learned, methods, and critical analysis.
• This option provides privacy for clients who would prefer information to not be made public.

EXTERNAL REPORTS, PRESENTATIONS & ARTICLES
• Distributes information clients are comfortable being public.
• Enables SWA to share lessons with other professionals, clients, and students.

OPERATIONS AND MAINTENANCE SUGGESTIONS
• Immediate feedback for clients to improve design performance.
CHALLENGES + SOLUTIONS

LOGISTICAL
How do we find time to execute amidst daily project work?

*Each POA study is allocated a fixed-budget, then tracked and billed same as a regular project. Staff and management treat it as part of their work-load.*

PHILOSOPHICAL
Can we perform unbiased assessments on our own projects?

*Generally, POA teams are comprised of members who had no involvement in the original project being assessed. Original designers can be interviewed, with their feedback compared with other data collected. Bias mitigation is a challenge for the DO & IK methodologies, requiring project and team specific strategies. Each year, we interview select participants to discuss the process, including logistical and methodological challenges, to improve for the next year.*

LEGAL
Are we at risk of implicating ourselves or our clients for negligence?

*Taking into account the statute of limitations, all POA projects are at least 10 years old since completion. Unexpected benefits have resulted including the ability to review projects that have reached maturity.*
BENEFITS

TRAINING + KNOWLEDGE BUILDING

By engaging new and mid-level staff in the assessment, they are provided a comprehensive and up-close view of how decisions made in the early stages of a project can have a lasting historical impact (both good and bad), often beyond what the original designers could have predicted.

Senior staff are provided the opportunity to revisit their work, this time through a critical assessment, allowing them the opportunity to refine their skills on future endeavors.

The collective professional knowledge of the studio increases through the collection and dissemination of this information and the ensuing dialogue.

DESIGN RIGOR

As clients are growing more conscious of metrics and performance, the POA Initiative enables our designers to incorporate evidence-based design into future work, drawing upon data and examples already available in our company resources.

NETWORKING

In conducting the POA research, the SWA teams reconnected with old clients, reforging a (possibly dormant) relationship with the potential to lead to future collaborations.
LOOKING AHEAD

DESIGN-LIFE-CYCLE

Design intentions are often lost, especially when reviewing work before the use of computers. SWA is developing a method to articulate intent and anticipated results for future designers to check against, tracking projects from job opening to POA.

EMBEDDED DATA GATHERING

Data gathering is the most challenging logistical component of POA. New tools and applications are available, but are most effective when built into designs. SWA teams are advocating for the use of these tools to help clients and designers alike.

EXTRAPOLATING TRENDS ACROSS PROJECTS AND TYPOLOGIES

As we building a library of post occupancy work, we are beginning to tease out trends across projects. These lessons will multiply as more work is reviewed.

ADAPTIVE PLANNING AND DESIGN

The next step beyond improving practice and maintenance, is a post-occupancy phase of work, where SWA assists clients with the curation of space, adapting to changing populations, program, and climate.