
The **USABLE BUILDINGS TRUST**

Trustees' Report 2004

UBT Annual Report 2004

This is the Annual Report of Trustees of the Usable Buildings Trust (UBT) for 1 January to 31 December 2004, the third year of charitable status, and the fifth since formation.

The Trust's objectives are to:

- promote studies of building performance;
- put the results in the public domain;
- disseminate and interpret the findings.

The Trust's activities cover:

- A reference point for clients and occupiers, who want independent guidance on the performance of buildings, and help with finding ways of achieving their ends (e.g. organisational, personal and business) through their buildings.
- Source material for educators and researchers, to assist with teaching, postgraduate and other research. Our current emphasis is on MScs for mid-career professionals.
- A shop window for designers, developers and constructors of audited case projects (mostly individual buildings, but also parts of buildings; and larger developments like campuses).
- Continuity for successful but time-limited projects such as Probe (1997-2002) and the Feedback Project (2001-2004) which would otherwise have lapsed.
- A forum for the development and promotion of techniques for use by anyone for studying buildings.
- An incubator for fresh research ideas which would normally not find funding elsewhere.
- A point of contact and network for enthusiasts and co-workers worldwide.

In 2004 UBT launched formally and ramped up its activities - drawing down our core funding more rapidly than in previous years but aiming to become financially sustainable in 2005. We have made good progress technically and have attracted a number of one-off donations, but we need to achieve regular funding for our core activities.

Launch Event

The launch event at Cumberland Lodge, Windsor Great Park on 1 May 2004, was very successful. It was part of the 4-day "Closing the Loop" conference on post-occupancy evaluation organised by Oxford Brookes University, which attracted ninety building evaluation specialists from around the world, mostly academics and practitioners, though there were a few clients and their advisers. The event confirmed the international influence of the work of UBT trustees and faculty and associated people and organisations through our university links and feedback user group. The sessions included three papers and two other presentations by UBT faculty members. Many other papers also referred to our work or had used techniques in the Feedback Portfolio (see below).

Launch Document

A short brochure on the Trust, complete with donation form, was produced for the launch and is being distributed widely. A longer document on feedback and its benefits was drafted as an output of the Feedback Research Project with some assistance from the Office of Government Commerce. The form in which this will be published is not yet clear.

The Website www.usablebuildings.co.uk

The website now has typically 80,000 - 100,000 "hits" per month, and 4,000 pdf monthly downloads of publications. Most of the material can be downloaded freely, but some has copyright and other restrictions and requires passwords. We now have 1300 password holders with whom we also exchange emails. Changes to the site have been incremental, with typically an update and a minor improvement (e.g. a new publication or link) every week. The website is currently a low-maintenance "warehouse" for material, but as the content grows there is an increasing need for a "shop window" to introduce people to UBT and the material. We hope to obtain funding for this in 2005.

The Feedback Research Project

Separately from their work with UBT, faculty members have been involved in a "Partners in Innovation" (PII) research project on making feedback and post-occupancy evaluation routine for the construction industry and its clients. This work was co-sponsored by the Department of Trade and Industry (DTI) and the Confederation of Construction Clients (CCC). In late 2002, CCC got into financial difficulties, was unable to continue its support, and team members approached UBT for assistance in completing the project. The Trust was unable to provide any financial support, but seeing the potential of this work we agreed to host material on our website and to seek ways of developing and disseminating this and other products once the research was over. We also helped to bring together a Feedback User Group of designers and their clients to test the prototype Portfolio of Feedback Techniques that had been developed.

UBT's involvement helped to convince DTI to continue their financial support of the project. The contract was completed satisfactorily on 31 March 2004, with the final report of the fourteen case studies approved for publication by all user group members and their clients in September. We thank faculty members on the project team for putting in a considerable amount of time at their own expense to help bring the research to a satisfactory completion, and the team and DTI for giving us the products of the project at no cost. We are now seeking support with developing and publishing the results and updating and maintaining the Portfolio of Feedback Techniques. We have also prepared a prototype user interface for a new Portfolio of Feedback Results and will be seeking funding to launch this new product in 2005.

Feedback User Group

UBT will continue to hold meetings of the Feedback User Group set up as part of the PII project. The first, on 26 May, reviewed the outcomes of the PII and possible futures for the Group, including perhaps a network of Groups in different sectors, e.g. higher education, schools, offices, retail and health buildings; and possibly public sector buildings generally. Members said they would come to User Groups if the meetings continued to be interesting. They also saw an educational role for the Groups in helping younger people engaged in feedback to gain experience and compare notes. They were less happy to pay subscriptions towards the operation of the group, but thought that UBT should be able to find sponsorship for this work, particularly for sector-specific activities.

Fundraising

We have been seeking funds from three main sources:

1. Individuals. Funds are beginning to come in, but mostly on a small scale. Following discussions with other fundraisers, we are planning to target larger individual donors.
2. Organisations. We have been meeting building-related organisations, especially clients and designers, to tell them what we are doing - often with a presentation to staff - and to seek donations. We are hoping that some of these will become regular core funders.
3. Honoraria. Honoraria for speaking engagements have been the most successful form of fundraising this year.

The fundraising is not just in the UK. Many of the speaking honoraria were for talks in North America. Following a visit by Adrian Leaman, we are also seeking corporate funding in Australia. When in the USA, we also had a meeting with the fundraiser for the Rocky Mountain Institute, which gave us valuable insights which we think will be relevant in the UK too.

North American Speaking Tour, November 2004

We were invited to give a half-day workshop on building performance evaluation at the annual Greenbuild Conference, organised by the US Green Building Council and this year attracting 8000 participants. We were able to expand this into a lecture tour of the West Coast by train, with additional half-day events (at the Pacific Energy Center, San Francisco and the Canadian Green Building Council, Vancouver). We also visited the Rocky Mountain Institute, Lawrence Berkeley National Laboratory, and the University of California, Berkeley and gave six shorter talks on various aspects of building performance assessment. The response of organisers and audiences was very positive.

Building Energy Certification And Benchmarking

The European Energy Performance of Buildings Directive requires buildings to carry energy certificates when they are completed, sold or let; and for public display for some buildings in use starting with certain public buildings. The Directive comes into force in 2006, with a 3-year phase in programme. The Trust is very interested in this subject - not only through its direct effect of helping to improve building energy performance and reduce damaging greenhouse gas emissions, but because it is likely to raise interest in building performance assessment generally. UBT has been active in policy development in this area, in particular in examining how statutory and voluntary activities might be combined to help achieve the Energy White Paper's envisaged "step change" in building energy performance. Faculty member Bill Bordass has been assisting the multidisciplinary professional group "the Edge" with this, in particular in developing a format for statements of a building's energy use and in organising a workshop at the Institution of Civil Engineers and a debate at the Royal Institution of Chartered Surveyors in September. Unfortunately, public funding for this work from government and EU source was scarce in 2004 and UBT had no budget for it either - so Bill has been distracted from other UBT work, including fundraising. We intend to correct this in 2005.

UBT postgraduate courses

Faculty members gave a number of half-day sessions on aspects of building performance to MSc courses at Cambridge, Oxford Brookes, Newcastle, and Reading Universities and University College London. UBT also has input into the British Institute of Facility Management's (BIFM's) Advanced Business Course. We are now rationalising some of these into taught modules which can potentially be delivered both in traditional and distance learning courses - for which funds are being sought. We are also considering new courses with the University of East London (in association with the Centre of Alternative Technology, where we gave two successful

initial lectures this year), and are in active discussions with three other UK universities.

Research supervisions

Faculty members are approached perhaps once a month by PhD and MSc students wanting assistance with their research, particularly to discuss the field, to make use of proven techniques, and for comments on their findings. To date this has been undertaken on an informal basis, and using the resources on our website. We are now considering how we can formalise these arrangements.

Soft Landings

Soft Landings is a new project management technique which involves the design and building team more after buildings are completed - allowing them to assist the client with initial occupancy, help to fine-tune the building, undertake assessments and learn from the experience. It has upstream implications for briefing, appointments of the design and building team, project programming and cradle-to-grave benchmarking. The procedure was initiated by Mark Way when chairman of the design practice RMJM, has been developed with the support of the University of Cambridge, and is now beginning to be tested. The technique could become a "process carrier" which would help clients and design and building teams to integrate building performance assessment and feedback into their activities and to use other techniques in the Feedback Portfolio. We have been speaking with Mark Way about opportunities for working with construction industry bodies to turn this into a Code of Practice.

Office Buildings and Business Performance

In 2004 we became aware of two initiatives to link office design with business performance, one by the Work Foundation (where we were asked to review their research proposals) and the other by CABI with the British Council for Offices (where we assisted in a proposal which was called to interview but not successful). We hope that new opportunities will arise from these activities in 2005.

Our Evolving Approach

The work of the Usable Buildings Trust is without precedent, so we have been evolving our own organisational model.

Our current approach is:

- High influence (if possible): aiming to improve and widen strategic thinking about building performance.
- Useful outputs which are objective, clear and helpful to everyday design and management decision-making.
- Aimed at specialists who are committed to improvement (but may later spread to a wider audience).
- Low fixed overheads, so that fluctuations in income do not become too destabilising.
- Global in outreach, with core activities in the UK but drawing on an extensive network worldwide based mainly on virtual contacts.
- Promoting social, economic and environmental stewardship through our own example, as well as encouraging others.

In early 2005, we will be reviewing this approach within the wider context of the Trust's ambitions and outreach, with an emphasis on how we may extend and stabilise our funding.

We look forward to further success in 2005 and beyond.

Trustees 2004 : Joanna Eley, John Field and Ian Laing.

Faculty 2004 : Bill Bordass, Sir Andrew Derbyshire and Adrian Leaman

Events 2004

WTB and AL, Probe Studies Update, Inter-disciplinary Design for the Built Environment postgraduate course, University of Cambridge, 7 December, 2004

AL, Real Feedback on Real Buildings, Sustainable Energy Ireland, Energy Sustainability in Buildings: Engaging the Client, University College Dublin, 25 November 2004.

AL, Real Feedback on Real Buildings, CIBSE Newcastle, 24 November, 2004.

AL, Human Factors: the bottom line, BIFM Business School, London, 24 November, 2004.

AL, Key Ideas from Two Decades of Building Performance Studies, Keene Engineering, North Vancouver, 15 November, 2004.

WTB and AL, Real World Performance Versus Design Intent: What Really Happens in Buildings, Canadian Green Building Council conference, Vancouver, 15 November, 2004.

WTB and AL, Building Performance in Use: What Works and What Needs to be Improved, Green-build Conference, Portland, Oregon, USA, 12 November, 2004.

WTB and AL, More Feedback Means Better Buildings, Pacific Energy Center, 851 Howard Street, San Francisco, 9 November, 2004.

AL, Post-Occupancy Evaluation: Sugaring the Pill, University of California, Berkeley Center for the Built Environment, 8 November, 2004.

WTB, Energy Certification in Europe. Will it make feedback routine and close the credibility gap between expectations and outcomes? Lawrence Berkeley Laboratory, California, 8 November 2004.

WTB and AL, Better Feedback For Better Buildings, Rocky Mountain Institute, Snowmass, Colorado, USA, 5 November, 2004.

WTB and AL, Improving energy performance and occupant satisfaction in green buildings, Basalt Town Hall, Basalt, Colorado, USA, 4 November 2004 .

AL, Thermal Performance: what the users say, UEL/CAT, Machynnleth, 29 October, 2004.

AL, Post-occupancy evaluation: Sugaring the Pill, School of Environment and Development, Sheffield Hallam University, 27 October, 2004

AL, Real feedback on real buildings, CIBSE National Conference, London, 30 September 30, 2004.

WTB, Building energy certification: what's in store? CABE seminar on sustainability, Commission for Architecture and the Built Environment, 22 September 2004.

WTB, Energy certification background paper, Edge Debate on the Building Regulations consultation Is the stick a big enough carrot? RICS, 13 September 2004

WTB, Voluntary carbon dioxide declarations for buildings, Edge workshop with nCRISP and the Sustainability Forum, ICE, 13 September 2004 WTB, Building Energy Performance, closing the

credibility gap, Edge workshop with nCRISP and the Sustainability Forum, ICE, 13 September 2004

AL, Post-occupancy evaluation: Sugaring the Pill, AIRAH ESD Conference, Museum of Sydney, Pitt Street, Sydney, Australia, Thursday September 2, 2004 WTB, Building Performance: myth and reality, Monthly dinner meeting of The Bond, Royal Thames Yacht Club, Knightsbridge, 1 September 2004.

AL, Productivity and Green Buildings, Capturing the benefits of green building, Melbourne Town Hall, Melbourne, Australia, 25 August 2004 AL, Occupant satisfaction and low-carbon design, Masterclass for the Carbon Trust, The Innovation Centre, Queen's Road, Belfast 21 July 2004.

WTB, How you can assess and improve your building stock performance, CIBSE Event, Understanding and Adapting Buildings for Climate Change, Café Royal, London, 6 July 2004.

WTB, The user's perspective, Comfort, behaviour, people and energy, IEA conference on cooling buildings in a warming climate, ADEME Centre, Sophia Antipoulis, Nice, 21 June, 2004.

WTB, What really happens in buildings, IEA conference on cooling buildings in a warming climate, ADEME Centre, Sophia Antipoulis, Nice, 21 June, 2004.

WTB, Breakfast debate for about energy labeling for buildings, The Savoy, London, 15 June 2004. WTB, Debate on Overcoming the barriers to market for low carbon and renewable technologies in the commercial office sector, Resource 04, BRE, Watford, 8 June 2004.

AL, Post-occupancy evaluation, University of Newcastle, 14 May 2004.

AL and WTB, Streamlining Survey Techniques, Closing the Loop conference, Windsor, 2 May 2004.

WTB and AL, Removing the Blindfolds: Making POE and Feedback Routine, Presentation graphics,

Closing the Loop conference, Windsor, 1 May 2004.

JF, Assessing building energy performance, WTB, Benchmarking, WTB, Why do buildings fail to be energy efficient? Launch conference on CIBSE Guide F, Energy Efficiency in Buildings, London, 7 April 2004.

WTB, Improving the energy performance of commercial buildings: closing the credibility gap, Improving Energy Efficiency in Commercial Building Conference 2004, Frankfurt Congress Centre, Germany, 22 April 2004.

AL, Human factors: the bottom line, BIFM Business School, London, 21 April, 2004.

WTB, The building in use: lessons for briefing, design and management, SHAPE seminar on Total Design: user client and designer perspectives, University of Cambridge, 15 April 2004.

AL, Lighting - what the users say, Society Of Light And Lighting, International Symposium on Workplace Lighting, Dublin, 2 April 2004.

WTB, A strategy for energy certification of buildings, European Commission Seminar on Energy Certification, Brussels, 19 March 2004.

AL, Post-occupancy evaluation, University of East London/CAT MSc in Sustainable Architecture, Centre for Alternative Technology, Machynlleth, 17 March 2004.

WTB, Natural ventilation and lighting: lessons from post-occupancy evaluation and Probe, University of Westminster, London, 9 March 2004.

WTB, The role of building evaluation and feedback, Building Sustainability Conference, Martin Centre, Cambridge, 4 March 2004.

AL, People, Health and Buildings, MSc in Facilities management, UCL, 12 February 2004. WTB, Probe and beyond: getting feedback to improve programming, design, construction and management, University of Oregon, Eugene, Oregon, 30 Jan 2004.

AL, People, Environmental Control and Buildings in Use, University of Reading, 27 Jan 2004.

WTB, Feedback: history of Probe and other UK activities, ASHRAE winter conference, Anaheim California, 26 Jan 2004.

WTB, Building Performance and Post-Occupancy Evaluation, Experience in the UK and Opportunities for ASHRAE, ASHRAE winter conference, Anaheim, California, 26 Jan 2004.

WTB Closing the feedback loop in buildings, Green Round Table, Boston, Mass, USA at Genzyme HQ, Cambridge, Mass, USA, 23 Jan 2004.

Publications 2004

W Bordass, Learning from what we build, in S Macmillan (ed), Designing Better Buildings, 21-32, Spon Press (2004).

A Derbyshire, Architecture, Science and Feedback, Keynote address prepared for Closing The Loop: Post-Occupancy Evaluation: The Next Steps, Windsor UK (29 April - 2 May 2004).

A Leaman and W Bordass, Flexibility and adaptability, in S Macmillan (ed), Designing Better Buildings, 145-156, Spon Press (2004).

A Leaman, Outside the Comfort Zone: buildings and basic human needs, Human Givens Journal, Vol 11, no 2, (2004)

A Leaman and W Bordass, Let's think people, Building Services Journal 46-48 (April 2004).

R Cohen, W Bordass and J Field, Grading non-domestic buildings for their energy performance, International conference on improving energy efficiency in commercial buildings, Frankfurt (20-22 April 2004).

W Bordass, R Cohen and J Field, Energy efficiency in non-domestic buildings: closing the credibility gap, International conference on improving energy efficiency in commercial buildings, Frankfurt (20-22 April 2004).

W Bordass and A Leaman, Post-occupancy evaluation, Chapter 7 of W Preiser and J Vischer (eds), Assessing Building Performance, 72-79, Elsevier (2004)

A Leaman, Post-occupancy evaluation, Chapter 39 of S Road (ed), Closing the loop: benchmarks for sustainable buildings, 491-518, RIBA Enterprises (2004).

Papers In Preparation

At the invitation of the Editor, three papers based on the presentations at the Closing the Loop conference are in preparation for Building Research & Information - one on techniques, a second (with Mark Way) on Soft Landings, and the third on the results of the trials undertaken by members of the User Group.

We are also re-writing a chapter on human productivity in buildings for the second edition of Creating the Productive Workplace (D Clements Croome (ed), first edition published by Spon in 2000).

Full details of UBT Events and Publications may be viewed on www.usablebuildings.co.uk