The CHARRETTE as a decision making tool

U.S. Department of Commerce

21st Century Workplace
About our Presenter

- GSA Chief Workplace Officer
- Bachelor of Architecture
- Bach Environmental Design
- Certified Const. Manager
- Licensed Architect
- Licensed Interior Designer

U.S. General Services Administration
About our Presenter

• Principal Workplace Strategies
• BFA Interior Design
• MBA
• MPhil, Organizational Design
Business context

“Open for Business”

We examined DOC precepts to better understand current initiatives that inform and provide insights into the business environment. Current workplace typologies, along with building restraints (i.e. endless corridors, closed doors and “Dilbert-ville” workspaces) are in sharp contrast to DOC’s mission.

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Aligning the Workplace to the Business

1. Create the ‘21st Century Workplace’

2. Support Federal Governments workplace initiatives to reduce real estate and enable workplace performance

3. Develop a pilot project within a 10 week time frame

To present to DOC senior leadership the results of the workplace needs analysis and proposed solutions in the form of workplace design strategy scenarios to be used to inform the creation of the DOC pilot project for their 21st Century workplace.
Moving to a 21st century workplace

1. Transparent
   - Adaptable

2. Flexible
   - Hub - Web

3. Technology
   - Choice
   - Focus vs

4. Multi-generational

5. Mission
   - Choice

Enabling choice & adaptability

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Informing the pilot project strategy recommendations

For a pilot project, the strategy recommendations need to take the research findings in the context of the project goals and objectives to uncover what needs to occur to achieve the project goals. The role of research is to uncover what currently exists and what needs to be potentially modified to achieve those goals.

Uncovering change management issues

Research

Key findings and Insights

Charrettes

Project goals and objectives

Surveys
Work sessions
Observation

Idea generation
Concept development

Workplace design strategy scenarios

Uncovering change management issues
1. Key findings
2. Key insights
3. Defining the DOC 21st century workplace
4. What does the DOC 21st century workplace look like
5. Key challenges

Creating the DOC 21st century workplace
Charrette session goals

• Identify workplace settings that will enable DOC HQ to serve as a tool for workplace effectiveness.
• Identify workplace settings that will enable each bureau to work more effectively.
• Identify between the various bureaus commonalities and differences in work styles and the types of work settings that will accommodate each.
• Develop a kit of parts that will enable adaptability and flexibility.
Charrette Process

The charrette sessions were used to allow DOC staff to craft their vision of the 21st century workplace.
Metrics: activity based work settings

The activity based kit of parts provide building blocks to perform all of the work functions within the work modes of initial and group work activities. It's foundation is the premise that different work functions are best accommodated in different settings which ultimately leads to more interaction and transparency as well as balance and adaptability.

**Dedicated office**
Enclosed space for exclusive use by 1 individual.

**Dedicated desk**: An open work space for exclusive use by 1 individual.

**Quiet room/short stay room**
Shared use enclosed room, bookable or ad-hoc use for concentrative quiet work.

**Touchdown benches**
Large work table or center for use by a number of individuals either shared ad-hoc or by a team.

**Informal collaborative space**
Open collaborative spaces for non bookable serendipitous meetings.

**Conference rooms**:
Enclosed bookable rooms for variety of size meetings where teleconferencing is used or there is a need for piracy.

**Hub/resource area**
Shared semi enclosed space for centralized copying and printing as well as collating activities.

**Business lounge**:
Hotel airport lounge style shared workspace accommodating a variety of individual and group activities.
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Process
Process

Common and shared spaces located at corridor intersections
Process

All full height elements is work zones located in-board making available natural
Key findings: what we have learned

The team spent 6 + weeks doing research, conducting work sessions and informal interviews, observing work patterns in both existing work spaces and temporary swing spaces. Additionally, organizational performance surveys were distributed to better understand DOC workers perceptions of how well their current work place settings support their abilities to conduct the work processes that support the performance of DOC. 11 key findings emerged that impact the development of the workplace design strategy for the 21st Century Workplace. These findings are grouped into three categories: culture, people and organization.
### Key findings: what we have learned

<table>
<thead>
<tr>
<th>Culture</th>
<th>Processes</th>
<th>Organization</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Belief in the mission</td>
<td>6. Teleworking is underutilized</td>
<td>10. Organizational structure and management styles not compatible with 21st Century work</td>
</tr>
<tr>
<td>2. HQ</td>
<td>7. IT has a long way to go</td>
<td>61. A 19th century building for a 21st Century workplace</td>
</tr>
<tr>
<td>3. Different cultures foster siloes</td>
<td>8. Collaboration is not easy</td>
<td></td>
</tr>
<tr>
<td>4. Space is about me</td>
<td>9. I need an office to focus</td>
<td></td>
</tr>
<tr>
<td>5. A collection of generations</td>
<td></td>
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</tr>
</tbody>
</table>
Impact to the Business

A holistic approach to project success:
Successfully implementing this pilot project will be contingent of 3 components coming together: Pilot project; technology interface; change management program.

A multi-faceted approach for successfully implementing the DOC 21st Century Workplace

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Key Insights: what findings mean for creating the DOC 21st Century Workplace

Siloed

Culture

Focus work

Processes

Organization

Collaborative

Balanced/choice

Hub - Web

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Top 2-3 Key Challenges

- Time + schedule
- Identifying pilot study participants
- Obtaining appropriate data to make informed decisions
- Organizational barriers
Key Learning's

Key insights: what findings mean for creating the DOC 21st Century Workplace

1. **Collaborative**
   - A culture of collaboration needs to be developed.
   - Move beyond a HQ mindset
   - Embrace change.
   - Build on commonalities and mission.

2. **Balanced/choice**
   - Create flexibility, adaptability and accommodation for differently work styles and work mode needs.
   - Create a balance between focus work and collaboration.
   - Change perceptions of how and where work is done.

3. **Hub - Web**
   - Develop a more flexible organizational structure and management style that supports new ways of working.

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Questions?
Developing a Workplace Strategy

**ETS** is a global leader believing in the power of learning – developing, administering, and scoring 50 million test in over 180 countries.
Developing a Workplace Strategy

**ETS** is a global leader believing in the power of learning – developing, administering, and scoring 50 million test in over 180 countries.
Our research team

Jeri Bogan Zielinski, MCR.w, CPM, CFM
Senior Director, Workplace Management

Tom Hatrak
Manager, Space Planning and Design

Melissa Marsh
Founder & CEO, PLASTARC
ETS background

- Founded in 1947
- 501(c)(3) non-profit organization
- ETS’ main campus is located on 376-acres outside of Princeton, NJ
- Approx. 3,200 employees on NJ campuses
- Committed to sound research, assessments, and testing to advance learning and increase opportunities for students internationally
Investing in the future - Landgraf
Learning and incorporating
Aligning the workplace to the business

ETS Strategic Portfolio Plan Framework

External drivers – what is driving ETS to change its real estate strategy?
- Globalization of product and customers
- Transformation to digital and on-line delivery
- Increased competition = higher uncertainty
- Lack of exit options on Rosedale campus
- Changing workplace practices/mobility
- Favorable lease rates in submarkets

Key real estate initiatives – what real estate actions must ETS accomplish to support the strategy?
- Increase utilization of owned asset
- Plan for long term exit of Legacy assets

Key enablers – what must ETS do as a company to support the strategy?
- Use holistic analytics to measure workplace effectiveness
- Migrate to “for profit” real estate practices
Our objectives

- Improve quality of workplace to support product development
- Increase understanding of critical work processes
- Develop a workplace strategy and set of standards shaped by ETS employee work styles and requirements
- Deliver test fit scenarios and guidance on future change management to build an iterative workplace change process
- Position future workplace standards to align with upcoming ETS business strategy & goals
Overall findings

Total allocation of space compresses many staff into limited space.

Space Use: Offices/Large PODs consume 76%. Individual/Executive offices consume 42% but hold 24% of FTE. 10% of space is shared by 25% of FTE.

Need to provide functionality for all, design for function not just hierarchy.

Mismatch of space allocation and functional requirements.

Rebalance space for collaboration & concentration, provide access to all staff.

High frequency of coming to campus, but then dialing in or doing individual work.

Enable collaboration technology on and off campus, expand telework option.
Badge swipe visualization

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Disparity of spatial allocation
Collaborative activity by dept.

**Offices**
- IT: 38%
- TLC: 26%
- Assessment Development: 23%
- Research: 23%
- Finance: 12%

**Workstations**
- IT: 23%
- TLC: 16%
- Assessment Development: 8%
- Research: 8%
- Finance: 12%

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Activity/space

At-Desk Activity

- IT
  - IT: 73%
  - Phone: 16%
  - Meeting: 11%
- Research
  - IT: 82%
  - Phone: 5%
  - Meeting: 13%
- Assessment Development
  - IT: 85%
  - Phone: 3%
  - Meeting: 12%
- Corporate Finance
  - IT: 87%
  - Phone: 11%
  - Meeting: 2%

Square Footage

- Wood
  - Core: 79%
  - Other: 0.5%
  - Informal/Soft Seating: 4%
  - Enclosed Meeting: 17%
- Turnbull
  - Core: 97%
  - Other: 0.5%
  - Informal/Soft Seating: 3%
  - Enclosed Meeting: 3%
- Messick
  - Core: 78%
  - Other: 1%
  - Informal/Soft Seating: 9%
  - Enclosed Meeting: 12%
- Landgraf
  - Core: 78%
  - Other: 8%
  - Informal/Soft Seating: 7%
  - Enclosed Meeting: 7%

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Existing work point types

- VP Office: 289.2 square feet
- Langraf Office: 141.6 square feet
- Office: 141.6 square feet
- ½ Office: 80.0 square feet
- C-POD: 97.6 square feet
- D-POD: 74.4 square feet
- 120° Workstation: 47.8 square feet
- G-POD: 34.3 square feet

SF shown is average of spaces in database
## Seat ratios

### Recommended & current

<table>
<thead>
<tr>
<th></th>
<th>Work points : away (all)</th>
<th>Work points : away (owned)</th>
<th>Work points : away (shared)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Best practice (range)</td>
<td>1 : 1-2</td>
<td>1 : 0-1</td>
<td>1 : 1-2</td>
</tr>
<tr>
<td>Best practice (example)</td>
<td>1 : 1.5</td>
<td>1 : 0.4</td>
<td>1 : 1.1</td>
</tr>
<tr>
<td>Wood Hall</td>
<td>1 : 1</td>
<td>1 : 0.8</td>
<td>1 : 0.2</td>
</tr>
<tr>
<td>Messick Hall</td>
<td>1 : 1.6</td>
<td>1 : 0.8</td>
<td>1 : 0.8</td>
</tr>
<tr>
<td>Landgraf Hall</td>
<td>1 : 1.6</td>
<td>1 : 0.7</td>
<td>1 : 0.9</td>
</tr>
</tbody>
</table>

**SHOULD BE LESS THAN 30% OF ALL**

**SHOULD BE MORE THAN 70% OF ALL**
Existing + NEW work point types

- **VP Office**
  - 289.2 square feet

- **Langraf Office**
  - 141.6 square feet

- **C-POD**
  - 97.6 square feet

- **D-POD**
  - 74.4 square feet

- **Convertible Office**
  - 141.6 square feet

- **Workstation**
  - 120° Workstation
    - 47.8 square feet

- **G-POD**
  - 34.3 square feet

- **½ Office**
  - 80.0 square feet

sf shown is average of spaces in database

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Space planning vocabulary

Recommended Kit of Parts & Seat type terminology

**Work point seats**

*Assigned individual desk seat*
- **Office seat**: Enclosed personal office
- **Workstation seat**: Open individual desk, part of a row or cluster, with some partition between

**Away seats**

*Seat not at a desk, that may be used for collaboration or retreat depending on department needs*
- **Owned away seat**: Away seat embedded within an individual office or workstation
- **Shared away seat**: Away seat that anyone may access, in a meeting room, phone booth, etc. In a space that is not an individual workspace
Workplace guideline objectives

Pillars of successful future workplace

1. Healthy & Healthful
Fulfilling bottom of Maslow's needs triangle - daylight, fresh air for all, better for all may require significantly different for some

2. Equitable & Fair
Transparency – people understand how decisions have been made and how space is allocated; allocation feels fair and consistent for all employees, incorporate Teleworking policies

3. Productive, Supportive & Aligned
Considers and sustains how people work from a practical/tactical perspective

4. Sustainable by Definition
Not just “green,” but a design solution that accommodates multiple needs, balancing the organization and the individual
Primary planning concepts

Shift enclosed spaces off perimeter

Pull workstations out to perimeter

Centralize leaders with teams around, provide immediate access to enclosure

Use enclosed spaces to create buffer zone between neighborhoods

Identify key nodes for retreat

Identify key nodes for meeting, assembling & collecting

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Future space types

Kit of parts recommended

INDIVIDUAL SPACES
- Office
- Shared office
- 120° Workstation
- Typ. Workstation

SHARED SPACES
- Lg. Meeting/Team Rm.
- Sm. Meeting/Retreat
- Focus booth/Cowork
- Open meeting/Cowork

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## Wood Hall: test fit 1A

**APPROX 16,000 SF**

<table>
<thead>
<tr>
<th>Seat Type</th>
<th>Quantity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work point seats</td>
<td>102</td>
</tr>
<tr>
<td>Workstation seats</td>
<td>102</td>
</tr>
<tr>
<td>Office seats</td>
<td>0</td>
</tr>
<tr>
<td>Away seats</td>
<td>120</td>
</tr>
<tr>
<td>Shared away seats</td>
<td>120</td>
</tr>
<tr>
<td>Owned away seats</td>
<td>0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>222</strong></td>
</tr>
</tbody>
</table>

- **0% office**
- **157 sf/work seat**
- Work points : shared away seats 1 : 1.2

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The change is the journey

01 Investment in Landgraf
02 Landgraf and legacy building research
03 New workplace guidelines
Let’s Discuss
A fundamental shift in the way we go to work
About our Presenter

Chris Hood

As a student of Alternate Workplace Strategies for over 34 years he shares his knowledge, experience and thought leadership with his clients, teammates and his industry. He is a past winner of Corenet’s Global Innovation Award, a founder and leader of their Workplace Community, and has spoken at Industry Conferences across the world.
Workplace360 is examining how we work at CBRE from all aspects – work environment, supporting technology, branding, personal productivity, space efficiency, sustainability, mobility, flexibility and more – applying this research to transform our future workplace.

- Improve the way we work
- Generate business
- Optimize our assets
PROJECT DELIVERY STRUCTURE

Executive Committee

Global Director, Facilities
Chris Bone

Project Advisory
Lenny Beaudoin

Project Advisory
Georgia Collins

Program Manager
Emily Neff

Project Lead
Meredith Bell

Project Support
Grace Liu

Variable Resource
Other

Director, IT
Alicia Spradlin

IT Delivery
Sandi Graham

IT Delivery
Danielle Diegel

IT Delivery
Clay Curlee

GF Finance
Patsy Kestler

GF Finance
Alecia Hill

Finance / Budget
Sen Chib

Transaction Mgmt
Ree Ryan

PJM SPOC
Toni Martin

PJM Director
Scott Fertitta

Local PJM
Other

Other
### Workplace360 at CBRE

**Who are we engaging with in the Americas?**
- **2,300** Survey Respondents
- **161** Visioning Session Participants
- **317** Interviewees
- **190** Focus Group Participants

**Who are we engaging with globally?**
- **49%** Average Utilization
- **290k+** Utilization Data Points
- **3,918** Employees Engaged (of ~47,000 total)
- **530,000+** Square Footage Impacted (of ~4.5m total)

**The impact of digitization**
- **17,535** Sf reduction in file drawers
- **1** Drawer per person in new model
- **$7.7M** Storage Savings (based on sf)
- **72%** Average purge rate
US LOCATIONS

TRAIL BLAZERS - 11

- Cleveland
- Kansas City
- Downtown LA
- Sacramento
- Orlando
- Downtown San Diego
- Carlsbad
- Ontario
- Honolulu
- Baltimore
- Downtown Chicago

UNDERWAY

- Denver
- Mexico City
- LA North
- Foster City
- Palo Alto
- San Jose
- Chicago Metro
- Columbus
- Greenville
- Houston

UPCOMING

- Miami
- Nashville
- Cincinnati
- Dallas
- Phoenix
WORKPLACE360 AT CBRE

Workplace360 is examining how we work at CBRE from all aspects — work environment, supporting technology, branding, personal productivity, space efficiency, sustainability, mobility, flexibility and more — applying this research to transform our future workplace.

TECHNOLOGY
- Laptops for all, 22" dual monitors, Box.com
- Media: Scape, Crestron reservations
- Media Wall, Oblong, Liquid Galaxy and more...

DIGITIZATION
- 72% average purge rate, 1,500 employees
- 25,000sf+ in storage space impacted
- Reduction from 4+ file drawers to 1 drawer

HEALTH AND WELLNESS
- Height adjustable workstations and focus room desks
- Healthy snacks, natural light, hydration stations
- Circadian lighting, Wellness room, plant life, and more...

ART AND BRANDING
- Employee committees, local artists
- Recycled materials, rotating artists
- Local brand, global context

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WORKPLACE360 AT CBRE

A CONCIERGE SERVICE MODEL FOR US AND OUR CLIENTS

92% of employees believe the work environment reflects a world class organization.
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NEIGHBORHOODS THAT PROVIDE FLEXIBILITY, AS WELL AS A HOME BASE

79% of employees feel more productive compared to the previous office space.
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AN ENVIRONMENT THAT PROMOTES INTERACTIONS AND COMMUNICATION

94% of employees agree or strongly agree that they are able to more easily collaborate
WORKPLACE360 AT CBRE

BUT, ALSO SUPPORTS ACTIVITIES THAT ARE PRIVATE OR CONFIDENTIAL

83% of employees agree or strongly agree that they are able to find spaces for private and focused work.
WORKPLACE360 AT CBRE

SEAMLESS TECHNOLOGY, ENABLING YOU TO WORK ANYWHERE AT ANYTIME

93% of employees believe Workplace360 reflects a reinvestment in employees, processes, and technology.
WORKPLACE360 AT CBRE

A HEALTHY WORKPLACE
THAT INVESTS IN ITS
EMPLOYEES’ SATISFACTION

86% of employees believe
the new work environment
creates a positive effect on
their health and well being
WORKPLACE360 AT CBRE

A BRAND THAT CAN BE IMMEDIATELY RECOGNIZED IN THE SPACE

86% of employees believe the work environment reflects their impression of the CBRE brand and promotes a positive image of the company.
BRING REAL ESTATE TO THE TABLE

93% of employees said they would not go back to the old way of working

HOW DO WE INTEGRATE AT CBRE?
✓ Global Facilities
✓ Workplace Strategy
✓ IT
✓ Project Management
✓ HR
✓ PR/Marketing
✓ Facilities Management

LESSONS LEARNED:
✓ Don’t underestimate the timeframe of a successful change management program
✓ Update Facilities policies – new cleaning procedures
✓ Update OpEx budgets – healthy snacks, employee activities, better coffee, etc.
✓ Between 30 days and 6 months is a critical time – continue to engage with employees

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