



# Findings from Post Occupancy Analysis of Four WorkPlace 20-20 Projects

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## Introduction

The post occupancy analysis summarized in this report was intended to identify linkages between the WorkPlace 20-20 engagement process, the strategic brief, the resulting workplace and whether the process and result had value to the client. Four projects were included in the analysis – Albuquerque Public Building Services (PBS) Service Center, Reno Veterans Affairs (VA) Regional Office, San Antonio GSA Property Management Center, San Francisco Chief Information Office (CIO). The four projects occurred over a span of time in which the client engagement process evolved from a span of months to the current one-week process referred to as the Deep Dive. The post occupancy analysis methods included: (1) review of existing materials documenting the original client engagement effort including goals and assumptions, (2) interviews with the WorkPlace 20-20 team (including regional and advocates, the GSA workplace manager, and the workplace consultant), (3) interviews and focus groups with the client leadership and staff, and (4) on-site observations.

## Summary

BPS identified a number of key “themes” that run through the four projects included in the post occupancy analysis. In addition, BPS’s review of materials from the Coast Guard project reinforces these findings. The themes fall into three overall categories that provide a view of current status and potential new directions for refinement.

### Workplace 20-20 Successes

- The WorkPlace 20-20 Engagement Process – Approaches and Results
- WorkPlace 20-20 Staff Expertise

### New Program Directions

- Clarifying The WorkPlace 20-20 Brand
- Integrated Processes—from first client briefing to final punch list
- Managing Expectations

### New Research Directions

- Business Goals vs. Individual Needs and Desires
- Workplace Noise

## Workplace 20-20 Successes

The overall message of the POE evaluation is clear – Workplace 20-20 is a success. It provides a workplace that the clients both need and want. It serves to support the business needs of the agencies while providing them with quality space that they are very appreciative of. The implications for the

Workplace 20·20 program is apparent in two areas both related to process and expertise of both the workplace consultants and the Workplace 20·20 and Regional Client Advocates.

### **The Workplace 20·20 Engagement Process – Approaches and Results**

In general, the Workplace 20·20 planning process has resulted in appropriate solutions for the businesses, one of the key questions in this analysis. The **use** of the workplace analysis tools is the most important element, not the tools themselves. A key message of the research is that the consultants are highly competent workplace experts and it is that expertise that is central to the solutions.

- Across the four projects there is only a modicum of consistency in the ways that each consultant firm undertook the effort. This also applies to the Coast Guard project in Oakland. In part this appears to be because of the different timing of each project in the course of the development of the 20·20 approach, i.e. some were early on and others were done as a Deep Dive.
- Each firm appears to be comfortable using its own tools and techniques and so the details of each process are different – including nuanced differences between approaches at different sites by the same consulting firm. When common tools are used, they are most often used differently and take different precedence in impacts they show on the analysis. To some extent the differences in approach may relate to the differences between the client organizations from project to project.
- Although the specific tools and even use of common tools is different from firm to firm, in most cases the information that was established and fed back to the client appears to have been both appropriate for that client and useful in generating solutions.

### **WorkPlace 20·20 Staff Expertise**

A second key element in the success of the Workplace 20·20 program is the expertise of the program staff – across the board.

- First and foremost it is the expertise and diligence of the Client Advocates that has provided the basis for the program's success. Without exception, each project was effectively shepherded along utilizing resources as needed and demanding proper design responses throughout the implementation process.
- The design expertise of the Client Advocates turned out to be significantly important in direct application to the smaller projects and in creating proper expectations for design in the others.
- As noted in the previous theme, the workplace consultants provide a consistently high level of expertise to the program. In each case the projects reflect that expertise.

### **New Program Directions**

While Workplace 20·20 is successful from the view of most clients, there are some consistent threads between projects that indicate where the final workplace can be improved. These improvements generally are outside the initial client engagement process and products, focusing on the expectations of clients overall and the structure of the implementation process. Expectations and implementation are in the end interrelated. The themes outlined below emphasize areas where Workplace 20·20 can make an even bigger impact, beyond the Deep Dive process.

## Clarifying The Workplace 20-20 “Brand”

Brand is basically a set of expectations about experience or result, e.g. we know what to expect when we drive into McDonalds, or Starbucks for those of us who don't go to McDonalds. The review process made it clear that Workplace 20-20 has clear name recognition with the four client groups. As a name it is well branded in that it is easily recognized. That name recognition suggests that emphasis be placed on two things that are apparent about that Workplace 20-20 brand:

1. There is not a clear set of expectations about what Workplace 20-20 provides, even though it is clearly recognized as a brand
  2. Workplace 20-20 is considered by the client to be an end result, not a process.
- From the client's perspective, it is ALL Workplace 20-20 – the client engagement, the brief, the design, and the final space, with the emphasis on the final space. We found little interest or ability on the part of the client to discern Workplace 20-20 versus “regular GSA” responsibility as it relates to the end result.
  - People refer to the office as “WorkPlace 20-20 space”; that is, the finished product is described as Workplace 20-20 – the interior glazing, low workstation panels, uniform standards are all perceived as Workplace 20-20.
  - In some cases comments suggest that in order to engage in a Workplace 20-20 project you have to agree to do certain specific things, like: have low partitions, move people out of offices, create transparency, emphasize open meeting areas, etc. Otherwise it's not a Workplace 20-20 project.
  - The client's don't see Workplace 20-20 as limited to a planning and discovery process that guides design strategy and solutions and in fact some are surprised (generally pleasantly) at the thoroughness of the planning effort.

## Integrated Processes

There are potentially serious impacts on the quality of the final workspace, and therefore the Workplace 20-20 brand, as a result of the separation of the initial client engagement, planning and implementation processes. The most successful projects were those where the implementation was led by people who were directly involved in the Workplace 20-20 planning process, or were at least familiar with its approach and emphases.

### Processes

- There is no natural integration of all of the project phases meaning that consistency and control is not built into the overall engagement process from the very beginning to the end.
- The workplace consultant “hand-off” depends very much on the willingness of the design/implementation team to take advantage of the knowledge of the consultant. Follow up was supposed to be part of the process and the contract, but the nature and quality varies.
- The design process is such that potentially important decisions are made at multiple places in the process. In the later phases of design, the Workplace 20-20 team or consultant is not available to guide the client in making decisions appropriate to the goals established in the planning process. In Chief Information Officer's workplace, this resulted in a lack of appropriate furnishings for reviewing document for the CAD group. In the Reno VA workplace, it resulted in a lack of supporting technologies in the document staging rooms that results in added steps for the staff doing the processing.

### Staffing/Roles

- The GSA project manager for implementation plays a significant role and is not always on board with Workplace 20-20 – some don't seem to have any interest and perceive the process as creating more work for them; the process gets in the way.

- Process seems to work best when there is a GSA person who is very committed and follows through on the whole project – such as San Antonio where the regional advocate was actively involved in the design and Albuquerque where one of the project managers ran the implementation process.
- In the case of the Veterans Administration, the VA project team both contributed to the decision problems and at the same time contributed some important help from the project management side.

#### Project Details

- It's not clear that the consultant brief gives adequate direction for design. It is not a program; how is the architect supposed to use the information? If the architect is supposed to do architectural programming, what is the intended relationship between the consultant's brief and the eventual program? This was a big issue on the projects that were done with an outside PBS design team.
- Information about budget seems to be seriously lacking in the early stages. While in theory it is possible to create appropriate responses with any budget, details matter and so then do the budgets that create those details. No one seems to know budgets during the client engagement period.
- There is no process for introducing the building to the occupants – in Reno, there was no introduction or move management or any form of attention given to helping the client organization anticipate what would be new / different about their new space (change management). Only two people in the whole region do move management and one was assigned to the San Francisco Federal building and the other had to take care of the rest of the region.

#### **Quality Control**

Quality control is an implementation issue, NOT a Workplace 20:20 process issue. The highest quality and most effective solutions were those where there was a direct link between the planning and implementation processes and where the implementation process was structurally appropriate to the workplace needs. Quality control is also a skill set issue. In some cases the skills of those undertaking implementation were not up to the demands / expectations of the strategy. In these cases, even the efforts of the Client Advocates are not enough to ensure optimal results under current implementation structures.

- In the Reno VA project, quality control was first a structural issue in that the planning team wanted a qualifications based approach, but GSA went with low cost as the approach to structuring the SFO.
- One result was that skill sets of the design team were clearly not up to the challenge established by the Workplace 20:20 strategy.
- A second result appears to be that there was no effective way to make trade-offs related to initial cost assumptions by the developer. The developer goes in with a low-bid approach and then it becomes too costly to add features because that is how he will make his profit – e.g. under-floor HVAC.
- In other cases, project management expertise and/or attention is lacking, to the detriment of the end product.
- The resulting overall impact is that the Workplace 20:20 brand suffers.

#### **Managing Expectations**

Expectations are important in two areas. The first is, what is Workplace 20:20 all about and what is the experience all about? The second is, given what we (the client) went through during the on site

engagement process what do we expect as a result? Part of expectations are what do “I” (the individual associate) get versus what is created for the business overall.

- As noted in other themes above, clients really don’t know what to expect from the WorkPlace 20-20 process and activities, and they often have the wrong assumptions about potential results as well.
- In some projects, there was a sense of “what it could have been, IF…” This was particularly true for the Reno VA, who are none-the-less happy with their new workplace.
- Consultants set high expectations for the space, but in all of the projects BPS reviewed, the expectations were not fully met. Even when people say they like the new space, there are elements that don’t work as expected.
- There is potentially a significant difference between meeting organizational expectations and individual ones (see research areas below). What is the appropriate target if they are in conflict? How should the WorkPlace 20-20 project team deal with this difference?
- The clients’ expectations about end results are established through their interaction with the WorkPlace 20-20 project team. When those expectations on the part of the client are significantly unfulfilled (as with the CIO project) they undermine the credibility of the WorkPlace 20-20 program.
- The key question is – why weren’t expectations met? Were they unrealistic to begin with? At what level of being “unmet” do they impact both work and the credibility of the program? Did images conveyed in briefs give the wrong impression of what the future workplace would look like? Were sacrifices made down the line? We need more information on this – it is a critical issue for GSA if it leaves clients with a feeling of unmet expectations.

## **New Research Directions**

A number of interesting questions arose out of the interactions that were part of the post occupancy analyses. We believe that they have the potential to make important contributions to both the WorkPlace 20-20 efforts and the workplace strategy field overall.

### **Business Goals vs. Individual Needs and Desires**

It was clear in each project that business goals and individual needs or desires may in fact be in conflict. The end result is that the business leaders may say that the space is a success while the individuals identify specific issues they have with its impact on them. This conflict occurs in projects both within the WorkPlace 20-20 program and in private sector projects as well. Identifying and understanding the impacts and alternative ways of dealing with them would provide an important contribution to the workplace strategy field overall.

- Across all of the projects, leadership wanted space that encouraged interaction, visibility, and communication.
- In some cases it was very clear why communication is important and in others less so. The linkages between communication and business goals expressed in the briefs varied across projects.
- A question to ask is whether the consultants are leading them to this conclusion because it is what they are finding in so much work today (communication is a common theme everywhere).
- Many, although not all, staff are more interested in how well they can isolate themselves, either to keep noise and interruptions down or simply to hide.

- Staff perceived the new spaces in all of the projects as more distracting. The nature of these distractions and the linkages and conflicts between these distractions and the “demands” of work processes are an important area for research.

### **Workplace Noise**

As an issue, noise is a common problem everywhere today. A better understanding of the problem and potential solutions could contribute to improvements in GSA projects and to the workplace field overall. The theme emerging from our POE has three parts overall:

1. Noise as it contributes to problems of focusing on work.
2. Noise as a behavioral issue and its linkage to design.
3. Perceptions of noise as “loudness and interruptions” vs. noise levels and the linkages in people’s minds with differences in degrees of enclosure, including partition heights.

### **Project Scale**

What is the importance of project scale? I would get to the key issues right away – what difference does scale make? Does increased/decreased scale have an impact on cultural characteristics of the organization? If so, how would you treat them differently? Does scale affect the ability to deal more effectively with noise issues by providing a greater variety of spaces in which to work? The Workplace 20·20 program addresses projects of significantly varying size and complexity, identifying the parameters of what might be different and what impact that makes would be valuable in creating more focused solutions.