Welcome to today’s presentation:

*Occupancy Planning and Workplace Solutions*

*February 18, 2021*

*The presentation will start at 1 pm Eastern*

**Note:** Phones are automatically muted during the presentation. Please send your questions in via your Q&A pane. Our SMEs will answer as many of the questions as possible during the presentation. All questions will be captured, and a formal Q&A document will be posted, along with the slide deck and session recording, on our website, [www.gsa.gov/ces](http://www.gsa.gov/ces)
Today’s Agenda

- **Requirements Overview**
  - Refresh on engaging early to help ensure solutions bring cost savings and meet mission needs

- **Understanding the Barriers**
  - Poll Question

- **How GSA Can Help...**
  - *Requirements Development and Resources*
    - Workplace Engagement
    - Pick a standardized work space or engage with our workplace team/IDIQ
    - Analysis to demonstrate cost advantage to your internal stakeholders
  - *Faster Delivery of Space*
    - Utilize AAAP accelerated procurements, DID workshops, etc
  - *Funding Options*
    - Tools to assist funding move, replication and furniture costs
  - *Return to the Workplace*
    - Strategies and Resources
Occupancy Planning and Solutions
February 18, 2021

Tasneem Bhabhrawala
Portfolio Management and Customer Engagement - PBS

Charles L. Robinson, Sr.
Personal Property Management Division - FAS

Ryan Doerfler and Jane Schuster
Center for Workplace Strategy
Office of Design and Construction - PBS

Mike Trotter and Anna Cafoncelli
National Office of Leasing - PBS
Poll Question

What barriers to requirements decision making does your agency face when thinking about future occupancy needs?

A. Where we we get the money from? - Funding
B. Who has time to prepare the package? - Time
C. How will we evaluate options? - Data and Analysis
D. Who has the knowledge/experience? - Resources
E. All of the above
F. Other (please write in the Chat pane)
Planning and Requirements
Why the Emphasis on Planning Early?

- Real estate changes take time

- Engaging you as the client or responding to changes 12-24 months prior to expiration, does not allow enough time to identify the right solutions, develop requirements appropriately, nor engage you fully.

- A business model that allows perpetual, unplanned extensions and short term fixes as a way of meeting our clients needs, is not sustainable for our workforce, nor yours.
Our Guiding Principles

• Government-wide policy and tightened budgets necessitate we partner to:
  – Reduce spending
  – Reduce the footprint
  – Increase space efficiency
  – Identify Opportunity Zones

• Shift is larger than PBS - goals supported by OMB and Congress
  – Freeze the Footprint & OMB Memorandum, May 2012
  – National Strategy for Efficient Use of Real Property, March 2015
Enhancing the Space Requirements Process

Based on your feedback, we identified the following areas needing improvement:

- Adoption of a standard requirements terminology
- A timeline of activities that allows us to collectively budget
  - Development of the Identification Process

Goal: Provide analytical, collaborative and transparent and consistent occupancy planning that allows PBS to be a resource and trusted partner when it comes to meeting your mission needs.
# PBS Project Lifecycle - Starts With Identification

## PBS Project Lifecycle

1. **Identification phase:**
   - Strategic Requirements *(high level project outcomes)*
   - Client Project Agreement

2. **Initiation phase:**
   - Functional Requirements *(more refined requirements)*
   - early schedule and budget developed

3. **Planning phase:**
   - Technical Requirements *(incl. agency build-out requirements)*
   - obtain funding commitment

4. **Execution phase:**
   - Final Requirements Package
     - project award / design / construction

5. **Closeout phase:**
   - final Inspections / punchlist
   - rent payments begin

6. **Operations phase:**
   - occupancy
   - continuous business relationship
What is the Identification Process and why are Strategic Requirements Important?
The Identification Process and Strategic Requirements

Promotes early analysis and decision making to ensure the right space solutions are executed collaboratively, timely and thoughtfully

• Promotes overall collaboration across PBS business lines to ensure PBS is meeting your mission in the most cost effective manners

• Fosters early discussions with you, which enables greater flexibility and presents more workplace solution options

Outcome: Strategic Requirements - high level parameters that set the limitations to the space:

• Total proposed USF
• Total headcount
• Agency UR Standard
• Location

• Use of space
• Parking
• Go/No-Go criteria
• Unique requirements
The Data GSA Brings To You...

● Your current PBS portfolio situation
● Geographic data, other agency locations
● Market research
● Our understanding of your priorities
● Options to assist with funding or space decisions
Project Identification and Strategic Requirements

The Timeline

Partner to optimize your real estate portfolio to deliver cost savings and footprint reductions

1. Identify Space Needs At 36 Months Out (18 months prior to congressional submission for Prospectus)

2. Partner with you to develop the Strategic Requirements utilizing the Client Project Agreement (CPA)

3. Discuss & Validate CPA

4. Strategic Requirements/Project Agreement @ 30 Months Out (12 months prior to prospectus submission OMB)

5. Initiate Project
We Utilize the Client Project Agreement (CPA) to:

- Facilitate collaboration, planning, and strategic requirements development in a **consistent and timely** manner

- Enhanced collaboration ensures space projects are well thought out and agreed upon
What Do We Need From You?

Starting the conversations early and consistently with GSA is critical to our joint success

We will engage with you:
- Non-prospectus: 36 months before occupancy expiration
- Prospectus: 18 months before our submission date to OMB

We need your **Strategic Requirements** by:
- Non-prospectus: by 30 months prior to occupancy expiration
- Prospectus: 12 months prior to GSA’s submission to OMB

We need your **Finalized Requirements** (functional and technical) by:
- Non-prospectus: 24 months before occupancy expiration
- Prospectus: 36 to 24 months prior to occupancy expiration (timelines can depend on complexity of the project)

*CILP Submission to OMB date will drive prospectus timeline*
Potential barriers to engaging with GSA on occupancy decisions

- Funding
- Capacity
- Expertise
- Data around unknowns or questions on the future of space
- New Administration
Let us help you navigate..
Breaking Down the Requirements Barrier

Solution: Requirements consultation, expertise and resourcing.
Requirements Development and Resourcing

Ryan Doerfler
Center for Workplace Strategy
Office of Design and Construction
Starting Early Lets You Consider Every Aspect of the Workplace

**Workspace**
- Space Standards
- Features & Performance
- Office Environment

**Real Estate**
- Building Attributes
- Site Attributes
- Location

**Supplies & Equipment**
- Furniture
- Fixtures & Equipment
- Support Services

**Technology**
- IT Infrastructure
- IT Services
- Telecommunications

**Business Processes**
- Performance Measures
- Staff Work Patterns

**Human Performance**
- Internal Communications
- Organizational Growth
- Culture Improvements
Workplace Engagement Activities, like our **Feasibility Scenarios**, are helpful tools to use during the **Identification** phase of the **Requirements Development** portion of the **PBS Project Lifecycle**.
• future scenarios using current details
• tests strategies (eg, desk sharing) in achieving space goals
• roughly estimates the cost of change
• starting point for developing workplace requirements

Contact ryan.doerfler@gsa.gov to receive a copy of WIFM
Choose from 3 Types of Scenarios

<table>
<thead>
<tr>
<th>Scenario</th>
<th>Location</th>
<th>Workstation</th>
<th>Enclosed Offices</th>
<th>Standard Support</th>
<th>Special Support*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Workstations Only</td>
<td>Up to 3 existing locations; independently calculated</td>
<td>Demo and Create New Space</td>
<td></td>
<td></td>
<td>No Change; Refresh Only</td>
</tr>
<tr>
<td>Office Renovation</td>
<td>Up to 3 existing locations; independently calculated</td>
<td>Demo and Create New Space</td>
<td></td>
<td></td>
<td>No Change; Refresh Only</td>
</tr>
<tr>
<td>Total Workplace Change</td>
<td>Consolidate up to 3 locations into a new location</td>
<td>Create New Space in a Warm Lit Shell</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* special support spaces are those spaces are not classified as Total Office (TTO) and would not be typically considered administrative office space. Examples include laboratories and server rooms.
With a little setup, WIFM is ready to use

1 Get It Ready
- Current Space
  - Geographic Location
  - Overall Space Areas
  - Average Individual Workspace Sizes
- Future Space
  - Geographic Location
  - Utilization Rate Goals
  - Headcount
  - Any Special Space

2 Try Out Scenarios
- Desk Sharing
  - % of Participants
  - Desk Sharing Ratio
- Individual Workspaces
  - Allocation
  - Average Sizes
- Standard Support Spaces
  - Bundles based on Overall Group Interaction

3 See the Results!
- ROM Space Calculations
  - Utilization Rate
  - Line-by-Line Breakdown
- Furniture Inventory
- ROM Cost Calculations
  - Tenant Improvement
  - Furniture
  - Technology
  - Workplace & Change Management
Customize WIFM for Your Agency

Built-in Customization Features

- individual workspaces: names and sizes
- standard support space: names, sizes, and descriptions
- furniture cost estimate source data

Supplemental Customization by GSA

- change utilization rate calculations
- adjust preloaded special space types and costs
- fine-tune furniture, equipment, and technology costs
- connect WIFM to your agency’s Excel-based space calculation tools
A Wide Variety of Support is Available Now

Beyond Feasibility Scenarios, Workplace Strategy Development efforts help inform the next phases of Requirements Development, Project Initiation and Project Planning.

PBS Project Lifecycle

- Identification
- Initiation
- Planning
Create Lasting Impact with Workplace Engagements

The Effective Workplace

**Workspace**
- Space Standards
- Features & Performance
- Office Environment

**Human Performance**
- Internal Communication
- Organizational Growth
- Culture Improvements

**Real Estate**
- Building Attributes
- Site Attributes
- Location

**Business Processes**
- Performance Measures
- Staff Work Patterns

**Supplies & Equipment**
- Furniture
- Fixtures & Equipment
- Support Services

**Technology**
- IT Infrastructure
- IT Services

Download GSA’s *Activity Based Planning* publication at https://www.gsa.gov/governmentwide-initiatives/total-workplace/library
First, GSA engages your entire organization...

TOP DOWN
Leadership Perspective

what does future hold for their agency?
what is most critical in their new workplace?
how is the organization put together?

BOTTOM UP
Employee Perspective

what do employees think?
how do they actually work?
how have they adapting to their work space?
... using a variety of diagnostic research tools ...

### Top-Down Tools

**Visioning Session**
- Direction of workplace change
- Vision of the end-state
- Alignment among leaders

**1:1 Leader Interviews**
- Future business direction
- Gaps that inhibit change
- Modes of workplace & processes

### Bottom-Up Tools

**Pre-Ocuppancy Survey**
- Current space performance
- Mobility and work practices
- Telework/desk sharing potential

**Employee Focus Groups**
- Explore survey results
- Inform change mgmt strategies
- Identify opportunities/obstacles

**Time/Space Utilization**
- Measures actual use of spaces
- Validates other research data

**Current Space Analysis**
- Expert walk through to assess performance
- *Workplace Scorecard* to measure effectiveness

**Access Data Evaluation**
- Measures resource use, such as VPN & building entry
- Compare trends
... to create tailored workplace strategies.

<table>
<thead>
<tr>
<th>Workspace</th>
<th>Real Estate</th>
<th>Furniture/Equipment</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ design principles</td>
<td>☐ colocation requirements</td>
<td>☐ furniture configurations</td>
</tr>
<tr>
<td>☐ workplace neighborhood concepts</td>
<td>☐ desired amenities</td>
<td>☐ that accommodate a variety of work styles</td>
</tr>
<tr>
<td>☐ space program calcs</td>
<td>☐ portfolio adjustments for increased mobile work, such as increased working from home</td>
<td>☐ furniture and equipment features</td>
</tr>
<tr>
<td>☐ lighting &amp; acoustics</td>
<td>☐ lighting &amp; acoustics</td>
<td>☐ ergonomics</td>
</tr>
<tr>
<td>☐ desk sharing strategies</td>
<td>☐ desk sharing strategies</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Technology</th>
<th>Business Processes</th>
<th>Human Performance</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ personal technology</td>
<td>☐ distributed organization strategies</td>
<td>☐ methods for improving organization culture</td>
</tr>
<tr>
<td>☐ telework improvements</td>
<td>☐ workplace protocols</td>
<td>☐ enhanced collaboration and communication</td>
</tr>
<tr>
<td>☐ collaboration tools</td>
<td>☐ work style analysis for future operation improvements</td>
<td>☐ change management and communications</td>
</tr>
<tr>
<td>☐ identify infrastructure improvements to promote mobile work</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
National Strategies for an Entire Portfolio

Workplace Strategies - Recommended Space Types - Open Workstations

Overview of Types

- Orientation of workstations should maximize views and daylight, with spline walls perpendicular to exterior windows.
- Lower height panels are recommended for use in all areas to promote a visual sense of community and encourage collaboration.
- A percentage of Sit-to-Stand desk options should be included in any layout to provide options to employees.
- All workstations should have task lighting with occupancy sensors to minimize general lighting, to reduce glare, and provide options to employees.
- Monitor Arm (exception: 1a)
- Daily storage provided in all workstation types, permanent storage to provided at assigned only.

See each type detail sheet for additional information.
National Strategies for an Entire Portfolio – Concept 1

Concept Floor Plan 1

Choice of work settings to give staff individual choice and freedom as to where and how they want to work.

Central Open Collaborative Space
To allow groups to come together to share new ideas.

Mix of Groups
within one work area to allow for cross team connections, growth and unexpected change. Workspace choices to support work style.

Enhanced Technology
to allow staff to be efficient and be able to connect to share new ideas.

Population 26 to 100

Here is an example of a concept floor plan that emphasizes a culture of innovation. The success drivers for this group are:

- Create a cultural balance of innovation by inviting opportunities for individuals to initiate new strategies and be on the leading edge for new ideas and resources
- Enhanced Technology to allow staff to be efficient through their daily needs
- Varied Collaborative Space types to promote choice and individual freedom
- Visitor/Touchdown Spaces increased for use of externally mobile workers

35 Workstations & 12 Touchdown desks
6,828 usable sf
74 additional seats
Plan for 50 Staff
136 sf/person
Total plan: 2.4 seats per person
National Strategies for an Entire Portfolio – Concept 1 Isometric

Concept Floor Plan 1

Population 26 to 100
GSA is also available to support your workplace transformation project with the development of **Protocols**, **Evaluations** and ongoing **Change Management** support for your workforce throughout the project.

### PBS Project Lifecycle

- **Identification**
- **Initiation**
- **Planning**
- **Execution**
- **Closeout**
- **Operations**
Available Now - Work Pattern Space Calculation Tool

Excel calculation template that agencies can use on their own, or with additional customization by GSA.
Available Now - Work Pattern Space Calculation Tool
Enter Your Data

For each position, indicate desk sharing, work pattern, and workstation and office sizes ...

<table>
<thead>
<tr>
<th>Position Title</th>
<th>Total Headcount</th>
<th>Position Type</th>
<th>Quantity to Share a Desk</th>
<th>Desk Sharing Ratio</th>
<th>Shared Desks Only Subtotal</th>
<th>Shared &amp; Unshared Desks Total</th>
<th>At Workstation</th>
<th>Elsewhere in the Workplace</th>
<th>Outside the Workplace</th>
<th>Total</th>
<th>Primary Workstation Activities</th>
<th>Work Pattern</th>
<th>Workstation Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subtotals</td>
<td>300 ppl</td>
<td></td>
<td></td>
<td></td>
<td>97 desks</td>
<td>177 desks</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position 1</td>
<td>100 ppl</td>
<td>Federal</td>
<td>100 ppl</td>
<td>2.0 ppl : 1 desk</td>
<td>50 desks</td>
<td>50 desks</td>
<td>75%</td>
<td>10%</td>
<td>15%</td>
<td>100%</td>
<td>Concentrative</td>
<td>DBC</td>
<td>64 nsf</td>
</tr>
<tr>
<td>Position 2</td>
<td>100 ppl</td>
<td>Contractor</td>
<td>20 ppl</td>
<td>1.5 ppl : 1 desk</td>
<td>13 desks</td>
<td>93 desks</td>
<td>65%</td>
<td>25%</td>
<td>20%</td>
<td>100%</td>
<td>Interactive</td>
<td>IMI</td>
<td>48 nsf</td>
</tr>
<tr>
<td>Position 3</td>
<td>100 ppl</td>
<td>Other</td>
<td>100 ppl</td>
<td>3.0 ppl : 1 desk</td>
<td>33 desks</td>
<td>33 desks</td>
<td>25%</td>
<td>20%</td>
<td>55%</td>
<td>100%</td>
<td>Interactive</td>
<td>EMI</td>
<td>48 nsf</td>
</tr>
</tbody>
</table>
Available Now - Work Pattern Space Calculation Tool

Receive Recommendations

... and the tool will then automatically recommend a mix of meeting areas and other support spaces for that organization.

For a demonstration of the Work Pattern Space Calculation Tool, contact ryan.doerfler@gsa.gov

Tool recommends support spaces based on mobility and at-desk activities.

The recommendation can be used as a starting point for determining actual needs.
Breaking Down the Time Barriers

Solution: Faster Delivery of Space
Prepackaged Space Solutions
*When time is of the essence*

**Scope**
Customize all aspects of the workplace, including furniture and finishes

**Cost / Budget**
Minimize overall project costs, including TI and requirements development

**Time / Schedule**
Occupy new workplace as fast as possible
Prepackaged Space Solutions

Features

- **Accelerated Schedule**
  Dramatically decreased time for Requirements Development & DIDs

- **Market Friendly Approach**
  Earlier substantial completion → Lessor friendly approach

- **Less Effort / Same Value**
  Requirements Development & DID level of effort savings for GSA & Agency

- **Footprint Optimization**
  All plans yield All-In Utilization Rates within 180 USF/person.

- **Amortized Furniture Costs**
  Includes furniture from FIT offering, decreasing need for upfront funding.
Choose the model office floor plans that meet overall size and personnel requirements.

**Model A**
3,500 USF / 20 seats

**Model B**
6,500 USF / 43 seats

**Model C**
12,500 USF / 101 seats

**Model D**
25,000 USF / 178 seats
Step 1: Select Prepackaged Model(s), con’t

Models can be combined to meet larger requirement needs.

Model D
(25,000 USF)

+ Model C
(12,500 USF)

Combined Area: 37,500 SF

Combined Capacity: 279 seats
Calculates space needs and rough order of magnitude (ROM) cost estimates for TI and furniture.

### Summary Concept Design Calculations

#### Space
- Workstations: 6,933 usf
- Offices: 1,705 usf
- Collaboration Spaces: 4,958 usf
- Other Standard Support: 2,174 usf
- Internal Circulation: 9,735 usf
- Total Usable Area: 25,505 usf
- All-In Utilization Rate: 128 usf/person

#### Headcount Seating
- Available desk seats based on selected Models: 182 seats
- Personnel needing a desk: 180 seats

---

**Cost - Tenant Improvement**
- ECC: ~$2,245,232
- Design & Review: ~$280,854
- Management & Inspection: ~$224,523
- Total TI Estimate (+/- 20%): ~$2,750,409
- Average $/USF (+/- 20%): ~$108 / usf

**Cost - Furniture**
- Individual Workspaces: ~$608,521
- Standard Support Spaces: ~$281,735
- Installation: ~$178,051
- Escalation to Move-In Year: ~$563,408
- Total Furniture Estimate: ~$1,131,716
Step 3: Fine Tune Requirements

Select furniture components and finishes from a range of curated options.
Step 4: Assemble Requirements Package

• **Conceptual Design Floor Layout**
  Model Plans provided in AutoCAD that can be adjusted once the final location floor plate configuration is known, such as during the DID workshop.

• **Detailed Space Program**
  Generated by the Calculation tool, which can be edited to reflect the actual amount of circulation needed at the final location.

• **Rough Order of Magnitude TI Estimate**
  Generated by the Calculation tool; can be used as the functional estimate for TI allowance.

• **Furniture Inventory and Estimate**
  Generated by the Calculation tool; can be used during the furniture procurement.

• **Level 1+ Design Intent Drawings**
  DIDs that are in-between Level 1 and Level 2 in detail.
Step 4: Assemble Requirements Package
Level 1+ DID’s

Level 1+ DID’s

• Cover Sheet
• General Notes & Drawing Index
• Demolition Plan - Sample
• Construction Plan
• Power / Communications Plan
• Furniture Plan
• Finish Plan
• Elevations
• Sections
• Partition Sections
• Door Schedule
Faster Delivery of Space

Mike Trotter
National Office of Leasing
Faster Delivery of Space - Online Tools

• **Procurement Online Tools**
  – Pre-Packaged Requirements (Ryan)
  – Requirement Specific Acquisition Platform (RSAP)
    • A single award lease procurement tool that migrates GSA's traditional lease procurement method to an e-commerce procurement and transaction tool, collecting online offers for a specific space requirement.
  – Automated Advanced Acquisition Program (AAAP)
    • The AAAP is a multiple award lease procurement tool allowing the market to compete for multiple federal leases by submitting a single offer through a simple online platform.
• **Online Tools Opportunity**
  - FY20 Level of Effort savings for FTE was 10,000 hrs over ~550 projects
  - 1,100 projects are projected to be delivered in FY21
    - 28% are using an online tool (room to grow)
  - Online tools cut roughly 3 to 5 months off project schedules
Tools and Techniques

- Digital Signature Solution (DSS)
  - Go Paperless
    - There is no need to print any lease documents in a digital environment that is enhanced by FoxIt, DocuSign, G-REX, and our Google Suite of tools

- Speed up your cycle time
  - Routing leases by snail mail can take 2 weeks or longer. Our pilot revealed that leases can be fully executed within 24 hours with DSS.
Faster Delivery of Space - DID Workshop Benefits

• **Tools and Techniques**
  – Design Intent Drawings (DID) Workshop can trim months off a schedule, compared to the more common Iterative Process

**DID WORKSHOP**
- Concentrated in-person working session to produce final and approved DIDs
- Agency must agree to DID workshop in OA
- Attendees include:
  - GSA Representatives
  - Agency representatives plus local, security, furniture staff where applicable.
  - Lessor and appropriate staff, A/E

**ITERATIVE**
- Most commonly used process
- Project team assembles (in-person or telephonically) for a post-award kick-off meeting
- After meeting lessor’s architect develops the first iteration of the DID for Government review with set number of reviews per the Global lease
- Fire and life safety review after each iteration
Breaking Down the Funding Barriers

Solution: GSA has developed programs to assist you with upfront funding...
Furniture & IT Services (FIT)

• **Lease furniture & technology**, instead of paying for it all up-front
  – Furniture over a 5-year term
  – Agencies within NCR, IT over a 3-year term

• Your agency incurs **no obligation to keep the product**

• **Ownership can transfer to your agency** at the end of the agreement

Projects: 129

Total Spend: $153 Million

Overall Space Reduction: 3 Million Usable Sq Ft
FIT Mandatory Requirements

- Meets agency’s utilization rate (UR) policy. If no policy, then within 150 USF Total Office UR or 170 USF All-In UR.
- Locate enclosed spaces on the interior as design allows.
- Furniture panels less than 54” to maximize natural light.
- Open workstations less than 50 NSF.
- Enclosed offices less than 150 NSF.
- Tenant agency COR (Level 1) to perform project management and custodial duties during FIT term.
FIT Additional Requirements (Min. of 6)

Limit number of enclosed offices by meeting a minimum 1:8 office to workstation ratio.

Increase natural light by utilizing glass walls instead of solid walls where appropriate.

Create more open, interactive, free-flowing space to encourage collaboration.

Allocation workstation sizes based on work patterns and job duties.

Maximize space utilization by offering desk-sharing opportunities.

Offer a variety of reduced-noise spaces such as phone rooms, quiet spaces, and focus rooms.

Incorporate overall acoustical treatments and visual privacy when designing an open work environment.

Provide non-dedicated meeting spaces that are shared organization-wide and use a reservation system.

Offer a regular schedule telework program to employees.
Existing Furniture/Personal Property Strategies

Charles L. Robinson, Sr.
Personal Property Management Division
Evaluating Existing Items - Keep, Transfer, or Sell

- For large moves (and disposal projects)
  - Engage Personal Property Division at least 3-Months from lease expiration
    - For smaller disposals, at least 1 month out
  - Work with us to develop a disposal budget

- Resources: In-house; NUO; FAS; FMR

- POCs/References/Training/Guides

Early engagement
- Gives you a full array of options
- Supports cost avoidance
- Keeps you on schedule
- Promotes your success
Move Cost Funding Strategies

Anna Cafoncelli
National Office of Leasing
Addressing Your Upfront Funding Issues

Move Cost Program - Lessor Funded Option

Our Goal is to enable you to move forward on the decision to reduce your footprint when presented with upfront funding challenges.

If your agency would like to reduce or simply create a more efficient workspace, the Move Cost Program may be able to assist.

This funding strategy allows cash allowances to be applied towards move related expenses, furniture, and T.I buydown. (Costs that are typically funded via RWA).
Tools to Address Upfront Funding Issues

The Lessor Funded Option Program consists of two options:

- **Cash Incentive** - Lessor unilaterally offers an unsolicited cash incentive as part of their lease proposal. In order to use this option, the agency’s CFO must certify a financial need to utilize the cash incentive towards move costs or personal property.

- **Enhanced Allowance** - a specific required TI amount requested in an RLP that is intended for funding Government TI and move-related expenses.
Tools to Address Upfront Funding Issues

The Move Cost Program may be appropriate when:

- A project has the opportunity to **reduce** long-term rental costs (either RSF or rate reduction)
- Your agency can certify insufficient timely funding for project execution
- The subject leasing market contains Landlords willing and able to provide cash incentives or an enhanced TI allowance in their lease proposal.
- Your agency has a solid cost estimate for their Move and Replication Costs (inclusive of furniture, personal property etc.)
- The resulting rental rate does not exceed the high end of the market or Prospectus Rate Caps.
Enhanced Allowance in Leased Space Example

✔ Current RSF - 183k ($4.3M/year)
✔ New Lease RSF - 77k ($1.8M/year)
✔ 58% lease space reduction

Total Project Costs: $7.8M ($122/USF)
TI typically funded by KC mkt: $31/USF
Additional Funding required from Lessor: $91/USF

Lessor Funded TI projected impact to rental rate: $5.50/RSF

Despite adding $5.50/RSF to the rental rate, this project will still generate savings of $2.2M annually due to the reduction of space.

Projected 20 year Cost Savings: $43.9M

Agency X
Kansas City, MO
Breaking Down the Barriers for Your Return to the Workplace

Solution: GSA can help you transition back to the workplace
Workplace Services for Returning to Facilities

Jane Schuster
Center for Workplace Strategy
Office of Design and Construction
GSA Return to Workplace Strategy Book

Summarizes information across government and industry

Guidance and considerations

**Not** requirements or directives

Download from GSA’s [Returning to Facilities](https://www.gsa.gov/) site.

Strategy Book is divided into 5 sections:

- Business Planning - how to approach timing, capacity planning
- Workspace Behavior & Operations - protocols, cleaning and disinfection
- Facilities Readiness - physical distancing, circulation, floor plan examples
- Signage - downloadable [signage package](https://www.gsa.gov/)
- Additional Resources - GSA contacts and external links
GSA has identified 10 services for **Return to Workplace Planning**

- Purchased via RWA on a la carte basis
- Priced based on location headcount and complexity
- Contract available immediately - contact workplace@gsa.gov

1. Workplace Demand
2. Workplace Supply
3. Occupancy Stacking
4. AutoCAD
5. Furniture Test Fits
6. Customized Signage & Way-Finding Graphics
7. Validate Integrated Approach & Identify Gaps
8. Change Management Communications Planning
9. Behavioral Protocols
10. Day 2 and Beyond

**GSA’s Center for Workplace Strategy also has a national contract available to assist with any workplace planning, design or other need.**
Thank You for Attending
Occupancy Planning and Solutions
February 18, 2021

Tasneem Bhabhrawala
Portfolio Management and Customer Engagement - PBS

Charles Robinson
Personal Property Management Division - FAS

Ryan Doerfler and Jane Schuster
Center for Workplace Strategy
Office of Design and Construction - PBS

Mike Trotter and Anna Cafoncelli
National Office of Leasing - PBS
Wrap Up Poll - As a Result of Today’s Session...

How likely are you to reach out to our Team to find if these solutions can support your Occupancy Planning efforts?

A. Very Unlikely
B. Unlikely
C. Neutral
D. Likely
E. Very Likely

Would you be interested in attending a follow on CES session to take a deeper look at any of these solutions? (select all that apply)

A. Workplace Engagements
B. Workplace Tools (WIFM, Work Pattern)
C. Workplace Portfolio Analysis
D. Prepackaged Space Solutions
E. Leasing Tools (RSAP, AAAP)
F. FIT (Furniture & IT)
G. Personal Property Management
H. Move Cost Program
I. Return to Workplace Services
Occupancy Planning and Solutions

Resources & More Information

- Occupancy Planning & Requirements Development
- Center for Workplace Strategy
- Furniture & Information Technology (FIT)
- Personal Property Guides and Services Slip Sheets
- Return to Facilities Guidance
- Return to Facilities - Workspace Planning Resources
- GSA PBS National Customer Leads
Upcoming Client Enrichment Series Sessions

**RWA Policy Manual Highlights**

*Tuesday, March 9th 1pm eastern* - [Register Now](#)

**Introduction to Occupancy Agreements**

*Thursday, March 18th, 1pm eastern* - [Register Now](#)

**GSA’s COVID-19 Resources for Customers**

See our [COVID-19 Website](#) for our Emergency Response Activities and our [Returning to GSA Facilities page](#) for procedures and guidance for GSA Owned and Leased Buildings, Projects and Workplaces

Watch CES sessions on [YouTube](#)

**Bookmark and binge watch all your favorite CES sessions!**

[www.gsa.gov/ces](http://www.gsa.gov/ces)

clientenrichmentseries@gsa.gov
A Closer Look at the CPA - Part 1

Your Planning Manager will outline:

- The current occupancy and any unique/special considerations
- Analysis and rationale on potential solutions for the future occupancy and its location

Why is this important? PBS’ goal is to bring value to the discussion early to help deliver innovative space solutions when possible

### Part 1: Project Information

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<td>Fred Customer</td>
<td>GSA Planning Manager</td>
<td>Patty Planner</td>
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<tr>
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<td>GSA Planning Manager Email</td>
<td><a href="mailto:patty.planner@gsa.gov">patty.planner@gsa.gov</a></td>
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<tr>
<td>Agency POC Phone</td>
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<td>GSA Planning Manager Phone</td>
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### Part 1a: Space Planning Information

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A Closer Look at the CPA - Size, Location, UR, Budget

PBS will engage you to collaborate on the strategic requirements:

- Square Footage, Parking, Delineated Area
- Confirm utilization rate targets and methodology
- Preliminary budget costs estimates and high level schedules

Why is this important?
Our goal is to ensure early partnership and buy-in of a solution that is mutually beneficial for your agency and the taxpayer
A Closer Look at the CPA - Utilization and Location

PBS input:

- Utilization and Location Discussion
  - Current RTF alignment
  - Affirm UR methodology
  - Cost Avoidance Project determination
  - Delineated Area confirmation
  - High level schedule and risks

Why is this important?
It sets the objective/goal for the project going forward for both PBS and your agency
Planning Manager input:
• CPA checklist as needed
• Customer and PBS Agreement/Signature block
  - Any customer document that shows alignment is accepted as agreement

Why is this important?
It creates a joint project, where both parties are held accountable to stay within the project objectives.

This sets the strategic solution 30 months prior to expiration.
GSA’s Regional Workplace Network

Region 1
David Krassnoff
(david.krassnoff@gsa.gov)

Region 2
Jean Keane
(jean.keane@gsa.gov)

Region 3
Caitlin Zaslow
(caitlin.zaslow@gsa.gov)

Region 4
Amy Pegues
(amy.pegues@gsa.gov)

Region 5
Ronnie Bent
(ronnie.bent@gsa.gov)

Region 6
Allyson Sawatzke
(allyson.sawatzke@gsa.gov)

Region 7
Becky Parham
(rebecca.parham@gsa.gov)

Region 8
Lisa Lefkowitz
(lisa.lefkowitz@gsa.gov)

Region 9
Stacey Fong
(stacey.fong@gsa.gov)

Region 10
Peter Gray
(peter.gray@gsa.gov)

Region 11 (NCR)
Wendy Conty
(wendy.conty@gsa.gov)

Or reach out to us at
workplace@gsa.gov
Workplace Publications

Publicly available guides to aid workplace requirements development.

Available upon request to workplace@gsa.gov