(re) turn to work

JLL | Stantec

An overview for cities and counties

Speakers

Joe Judge
Executive Managing Director – Tenant Representation
Joe helps local governments with real estate strategy, site selection, and transactions

Adam Cook
Managing Director – Portfolio Programs

Adam leads capital planning, construction, and return-to-work programs

Pablo Quintana
Design Principal– Stantec

Pablo leads Stantec's Washington DC office providing workplace strategy and design

Martine Combal
Senior Vice President – Public Institutions

Martine creates real estate and workplace solutions for local governments

Our purpose in light of COVID-19

Supporting Public Health

Feeding America

Advising Governments on Re-Opening

COVID-19 government experience journey

Shock
Denial and disbelief

Realization
Confront the impacts and dynamics

Response
Shelter in place drives government and workplace closures

Future-fit Resiliency Planning
Parallel path to more resilient and adaptive future state

(Re)imagination
A new Workplace of the Future

Implementation
Implement the new vision

Flourish
Feed, nurture and cultivate, thrive

Government & Workplace Continuity:

- Scale remote work program
- Communication / governance
- Scenario planning

(Re)Opening:

- (re)activate space
- (re)spect health and wellness
- (re)vitalize property and workplace
- (re)instate full public services

Productivity challenge
Improve productivity

The Next Normal

We're all here, in this together

Source: JLL, April 2020

Polling question

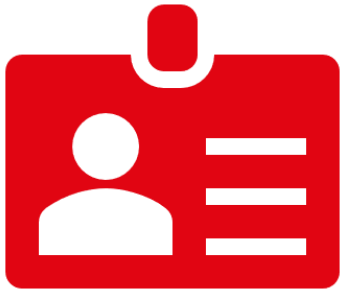
DO YOU FEEL PREPARED TO REOPEN YOUR GOVERNMENT OFFICES?

© 2020 Jones Lang LaSalle IP, Inc. All rights reserved.

Workplace Survey Results

May 2020

ICMA membership survey



26%

Have a Re-Opening strategy with Return-to-Work plans in place

63%

Have a plan in progress

11%

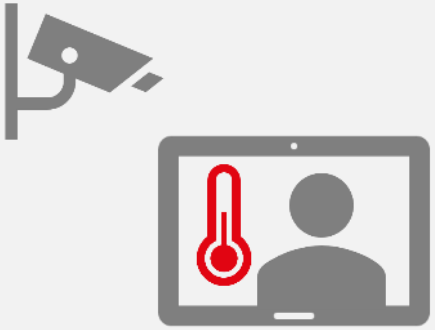
Have not begun to craft a plan

37%

Had a telework policy pre-COVID-19

89%

Believe the current telework policy is working



Top 5 Solutions:

1. Provide PPE (83%)
2. Continued telework (77%)
3. Additional janitorial (74%)
4. Employee shifts (60%)
5. Temperature scans (51%)

$$$

10 – 20%

2020 FY Budget Shortages

Workforce discoveries

TRANSPORTATION – 28% of Public Transit riders pre-COVID-19 want to find an alternate transit method

WORKING FROM HOME – 65% of employees who never worked from home before, prefer a WFH option

CURRENT PRODUCTIVITY – Majority feel productive with 20% claiming higher productivity

SAVINGS – Employees are averaging a 20% savings

COMING TO THE OFFICE – 'Informal Collaboration' is the #1 reason employees want to work in an office

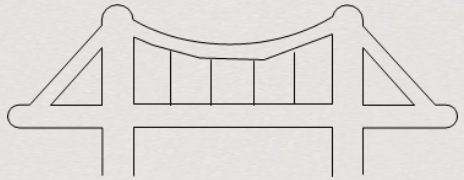
COVID-19 government experience journey

Shock
Denial and disbelief

Realization
Confront the impacts and dynamics

Response
Shelter in place drives government and workplace closures

Future-fit Resiliency Planning
Parallel path to more resilient and adaptive future state



(Re)imagination
A new Workplace of the Future

Implementation
Implement the new vision

Flourish
Feed, nurture and cultivate, thrive

Government & Workplace Continuity:

- Scale remote work program
- Communication / governance
- Scenario planning

(Re)Opening:

- (re)activate space
- (re)spect health and wellness
- (re)vitalize property and workplace
- (re)instate full public services

Productivity challenge
Improve productivity

The Next Normal

We're all here, in this together

Source: JLL, April 2020

(re)opening Government Workspaces

Polling question

HOW MANY OF YOU HAVE CONSIDERED INCORPORATING HEALTH AND WELLNESS ELEMENTS IN YOUR RETURN-TO-WORK PLANS (SUCH AS WELCOME BACK “KITS”, WORKSTYLE SUPPORT, ETC.)?

© 2020 Jones Lang LaSalle IP, Inc. All rights reserved.

A holistic approach to (re)opening your workspace

Employee & visitor screening
- Visitor screening services
- Temperature screening

Building and office operations
- Building technical readiness evaluations
- Safety, compliance and risk inspections
- WELL strategy & implementation plan
- Energy cost control
- Facility mothballing
- Engineering continuity planning
- Remote monitoring of dark buildings
- JiLL - AI-based digital assistant

Food and beverage
- Food service optimization

Janitorial
- Preventative, reactive, and decontamination cleaning
- Enhanced standards

Employee health and wellness
- Experience ambassadors
- Welcome back kit
- Well-being toolkit
- Mobility ambassadors
- Progressive workstyle support

Space guidelines and adjustments
- Occupancy re-entry guidelines & policies
- Social distancing strategy and enablement
- Foot traffic management and wayfinding
- Attendance monitoring & self-reporting
- Meeting and collaboration space management
- Project delivery services
- Flexible space risk advisory

Mail services
- Amended mail service
- Digital mail lockers

© 2020 Jones Lang LaSalle IP, Inc. All rights reserved.

Must haves for (re)opening

Welcome and Reception

Employee and visitor screening and waiting areas that comply with social distancing guidelines

Safety and Sanitation

Focus on cleaning, sanitation amenities, PPE, and site preparations

Circulation and Common Areas

Creating single direction circulation and re-thinking the throughput of common areas such as pantries, casual meeting space, and print centers

Signage and Communications

Tools to communicate new office behaviors and promote wellness and awareness

Workstation Modification

Short term strategies to address workstation and proximity as well as communal seating areas and non-designated work areas

Reduce Contact Points

Quick options to improve indoor air quality, increase surface sanitation, and install touchless features

© 2020 Jones Lang LaSalle IP, Inc. All rights reserved.

Day in the life

7:30am
Walk, ride or drive to work

8:30am
Take the elevator to floor

8:50am
Navigate to desk

10:30am
Meet colleagues in a conference room

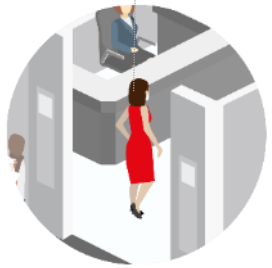
1:30pm
Bathroom break

3:00pm
Collaborate with colleagues

5:00pm
Navigate to exit

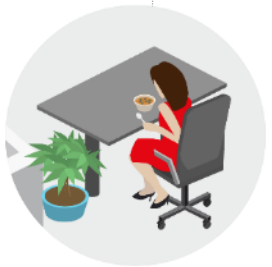
8:15am
Arrive and go through entry screening

8:45am
Go through additional on-floor screening



9:45am
Coffee break

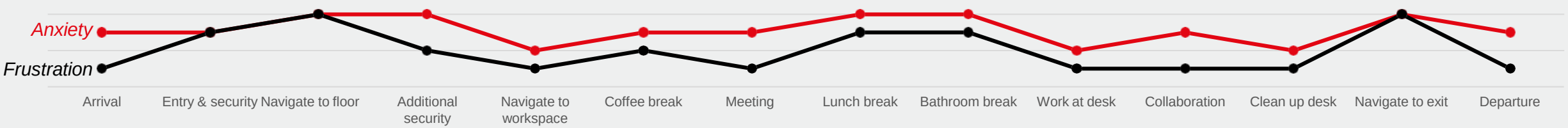
12:00pm
Lunch break



2:00pm
Work at desk

4:45pm
Clean up workspace

5:10pm
Leave the building



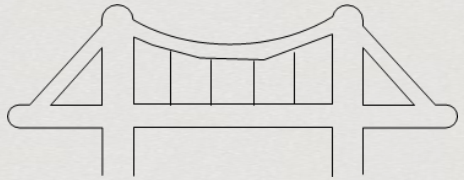
COVID-19 government experience journey

Shock
Denial and disbelief

Realization
Confront the impacts and dynamics

Response
Shelter in place drives government and workplace closures

Future-fit Resiliency Planning
Parallel path to more resilient and adaptive future state



(Re)imagination
A new Workplace of the Future

Implementation
Implement the new vision

Flourish
Feed, nurture and cultivate, thrive

Government & Workplace Continuity:

- Scale remote work program
- Communication / governance
- Scenario planning

(Re)Opening:

- (re)activate space
- (re)spect health and wellness
- (re)vitalize property and workplace
- (re)instate full public services

Productivity challenge
Improve productivity

The Next Normal

We're all here, in this together

Source: JLL, April 2020

(re)imagining Government Workspaces

Today: Workplace Challenges

Higher Densities

Workplaces have been decreasing individual space allocations. These practices translate to higher human densities

Shared and Communal Spaces

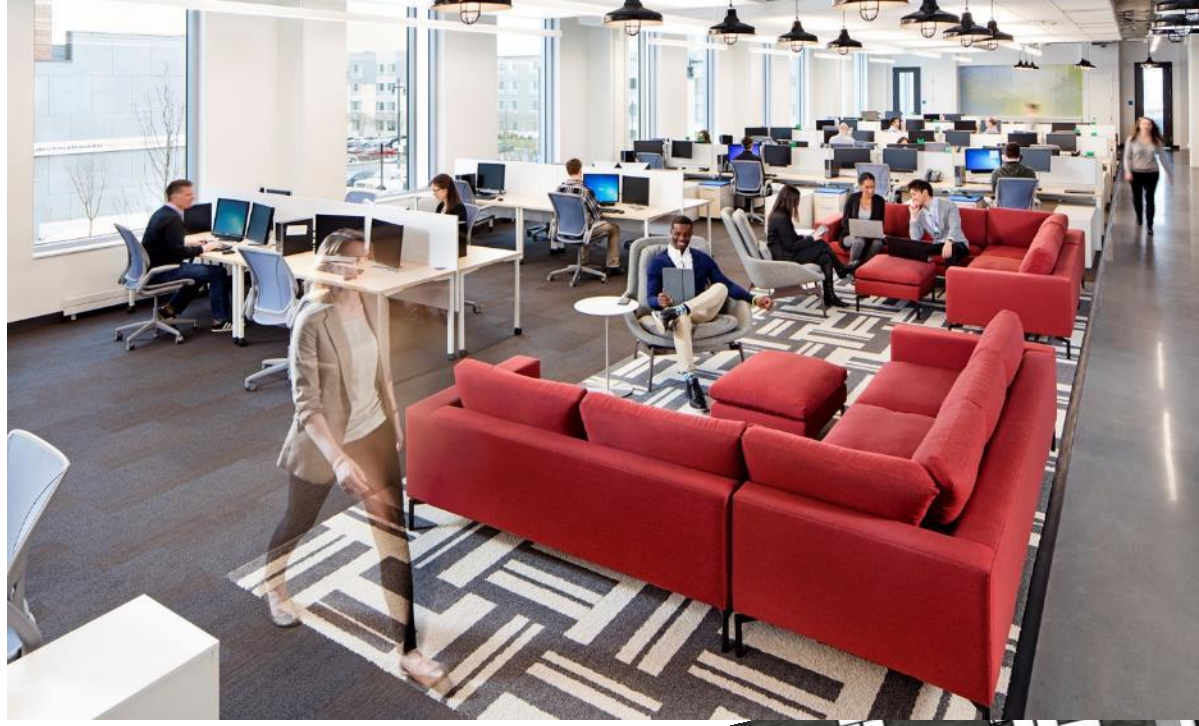
Shared and communal spaces are common practice in today's workplace enabling collaboration and often promoting large group gatherings

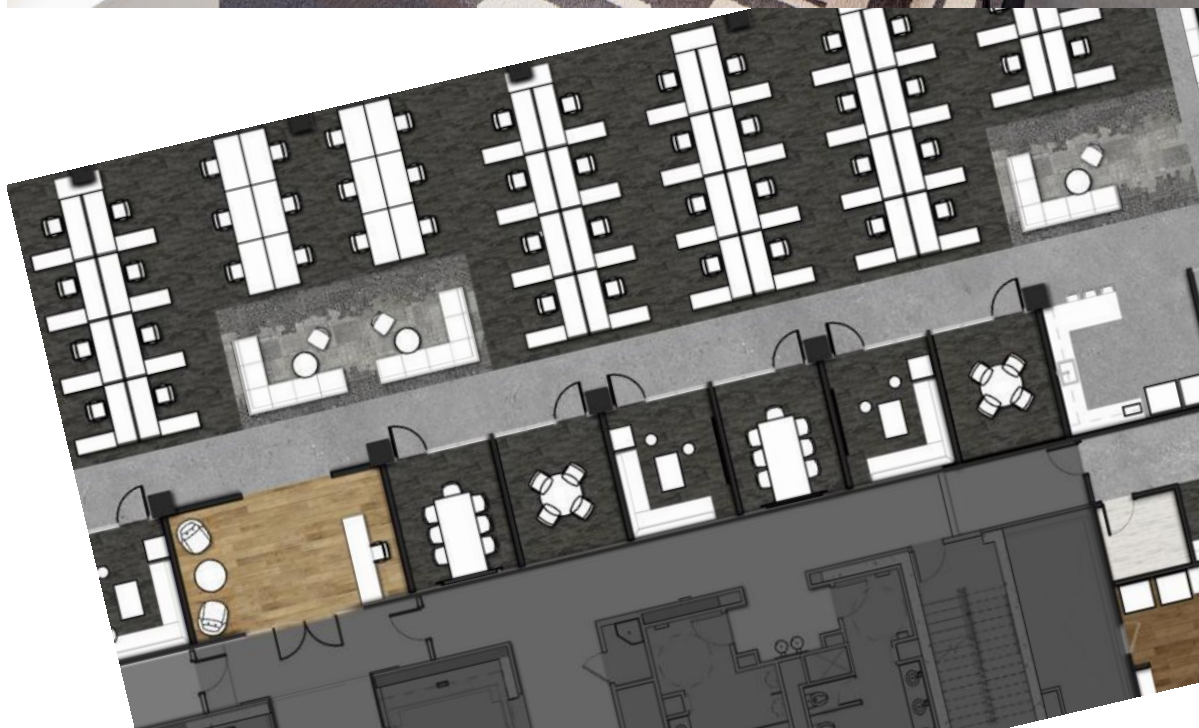
Open Plan

Open plan is the primary form of office planning around the world. Open spaces are more conducive to the spread of airborne pathogens

Mobility

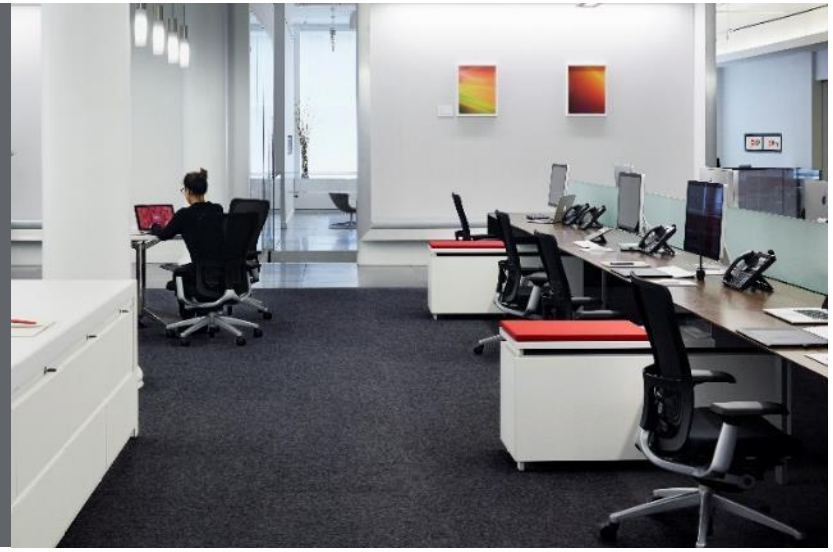
Mobile technologies allow individuals to change location within the workplace and gather easily

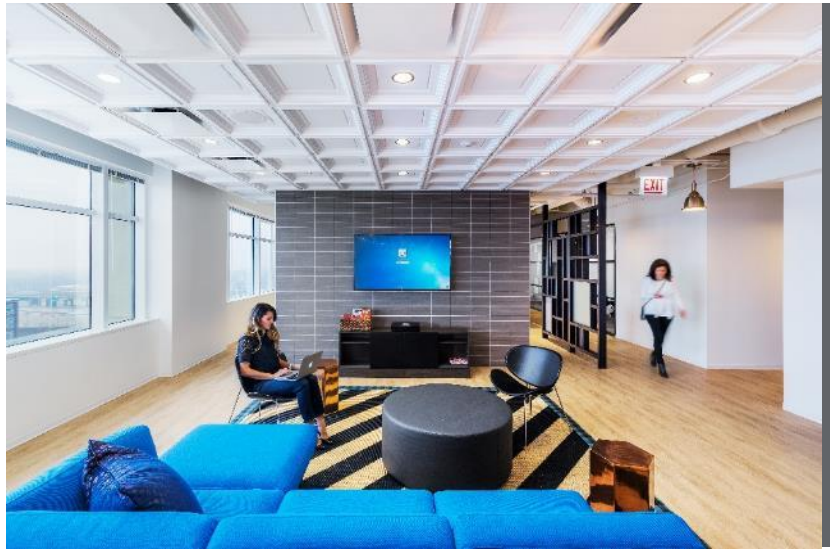




(Re)thinking space design

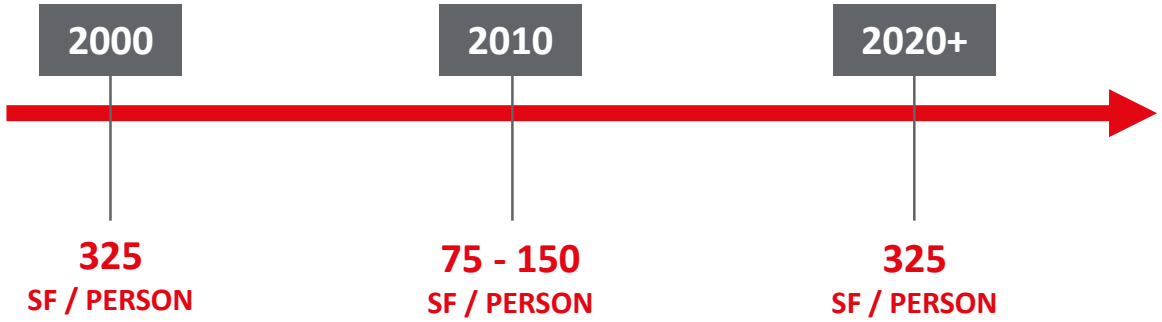
Benching, shared desks, hoteling stations – trending down





Need to rethink communal spaces, shared amenities and crowded "bottlenecks" like lobbies, elevators, bathrooms and cafes

A boomerang of space per employee?

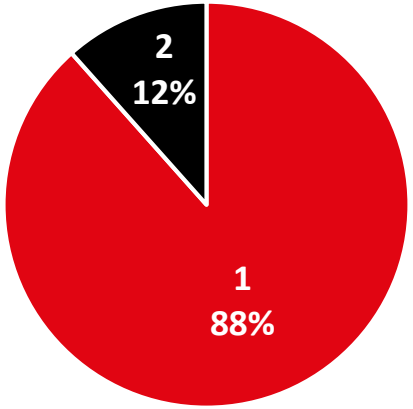


Critical for re-opening: estimating space usage, monitoring/ managing density and flow, creating flexibility to make adjustments and communicate protocols

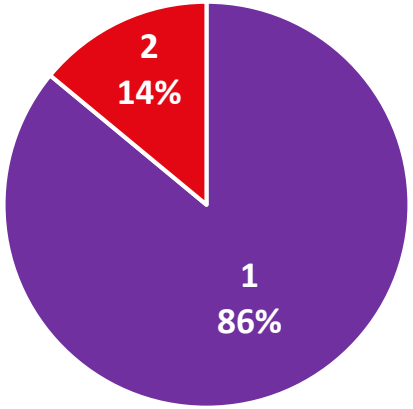
Initial government office re-opening is likely to be staggered and will impact near-term occupancy rates and densities, without an impact on capex.

Stantec client survey

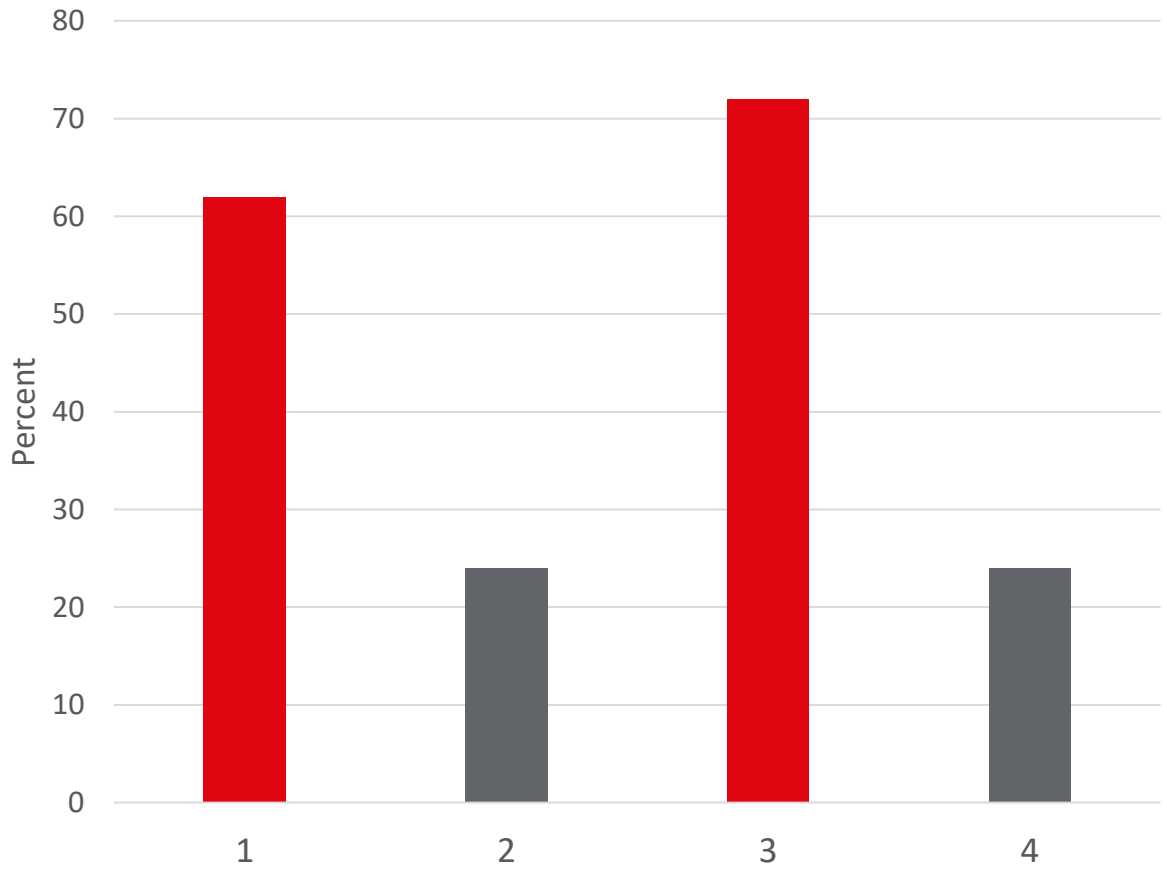
Question:
Do you feel like most employees within your organization are looking forward to being back in the workplace again?



Question:
Do you see your workforce continuing to work from home in the future if given the option?



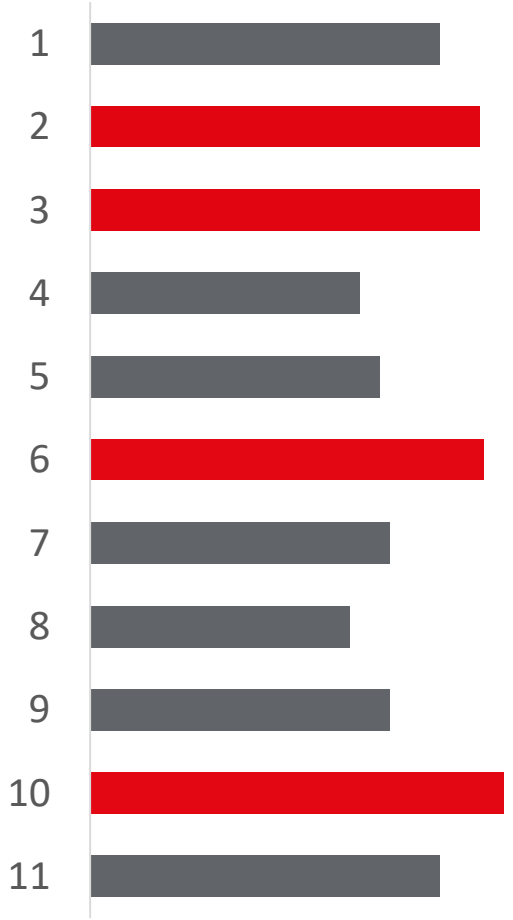
Question:
What do you feel employees within your organization miss most about being in the workplace?



Stantec client survey

Question:

What do you think will change the most in the future workplace as a result of the current stay-at-home restrictions?



Polling question

DO YOU THINK YOUR CITY OR COUNTY WORKFORCE WILL CONTINUE TO WORK FROM HOME IN THE FUTURE, IF GIVEN THE OPTION?

© 2020 Jones Lang LaSalle IP, Inc. All rights reserved.

Mid-Term: (re)configuration

FOCUS WORK + COLLABORATIVE HUB = CHANGE ON CULTURE & DESIGN SOLUTIONS

Plan for Change
Plan solutions that are highly adaptable so that spaces can change quickly in response to future disruptions

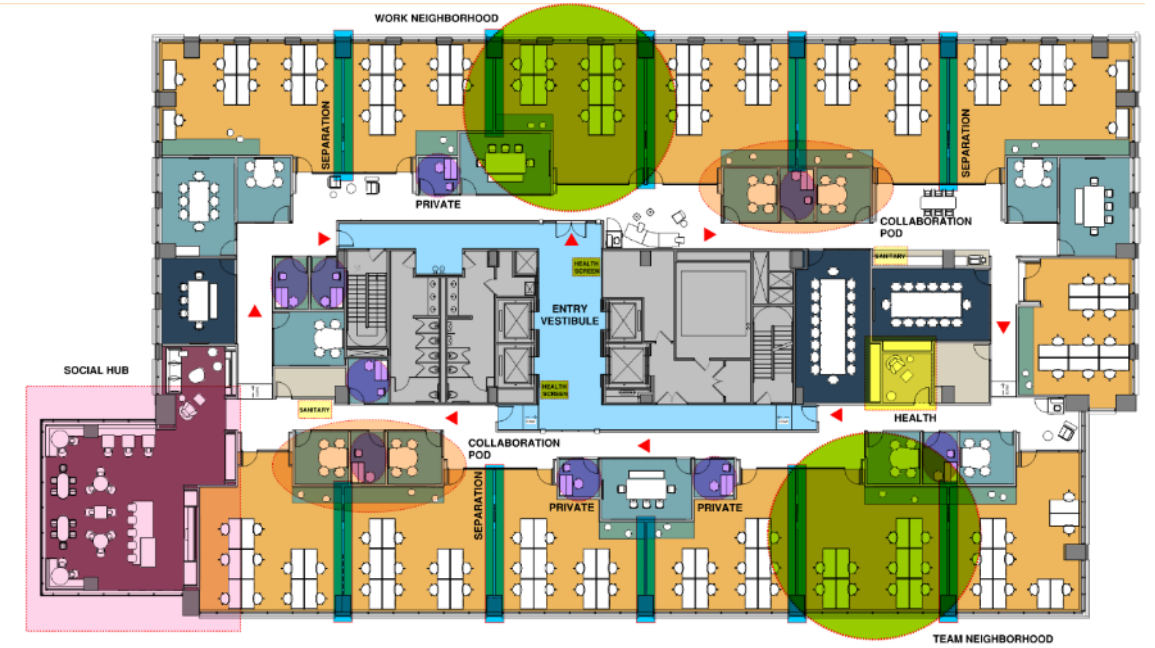
Performance vs. Presence
Oversight rules will need to be reconsidered. Management will need to trust in their teams to perform while not in the office

Agile Practices
Plan for smaller meetings, encourage standing meetings, and work everywhere policies

Change Geometry
Allow individuals to change desk orientation to avoid face-to-face work for prolonged periods

Me vs. We
People will need more boundaries around them to feel safe

Reduce Density
Plan for less people at the office at the same time, stagger schedules



Long-Term: (re)imagination

COLLABORATIVE HUB + SOCIAL HUB = THE NEXT NORMAL

Flexibility and Fluidity
Create a social and physical infrastructure that supports many ways of working

Design for Adaptability
Spaces must be able to easily expand and contract

Enhanced Virtual Experiences
Less travel means more virtual communication, invest in technologies that enhance remote collaboration

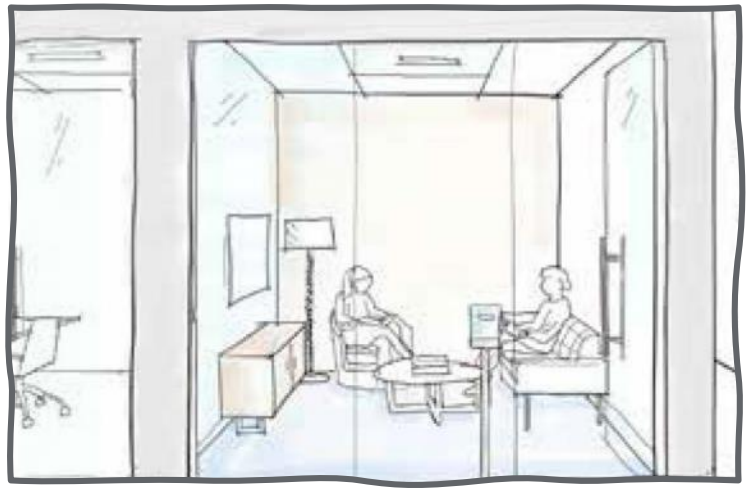
Hands-Free Work Environment
Apply solutions with gesture and voice-activated commands

Sensors
Measure aspects beyond utilization, tracking aspects of wellbeing including behaviors or actions that indicate illness

Rebuild Community
Be weary of a social recession spurred by lack of connection with others. Reiterate the organization's strategies and long-term vision and match it with the physical environment

The next normal?

EMPOWER CHOICE



Office

+

Home

+

Other

Governments that mobilize towards choice and prioritize "stakeholder- based" decision-making will be the most sought after and successful in the next normal.

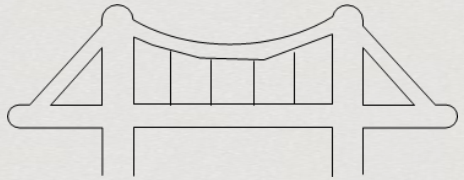
COVID-19 government experience journey

Shock
Denial and disbelief

Realization
Confront the impacts and dynamics

Response
Shelter in place drives government and workplace closures

Future-fit Resiliency Planning
Parallel path to more resilient and adaptive future state



(Re)imagination
A new Workplace of the Future

Implementation
Implement the new vision

Flourish
Feed, nurture and cultivate, thrive

Government & Workplace Continuity:

- Scale remote work program
- Communication / governance
- Scenario planning

(Re)Opening:

- (re)activate space
- (re)spect health and wellness
- (re)vitalize property and workplace
- (re)instate full public services

Productivity challenge
Improve productivity

The Next Normal

We're all here, in this together

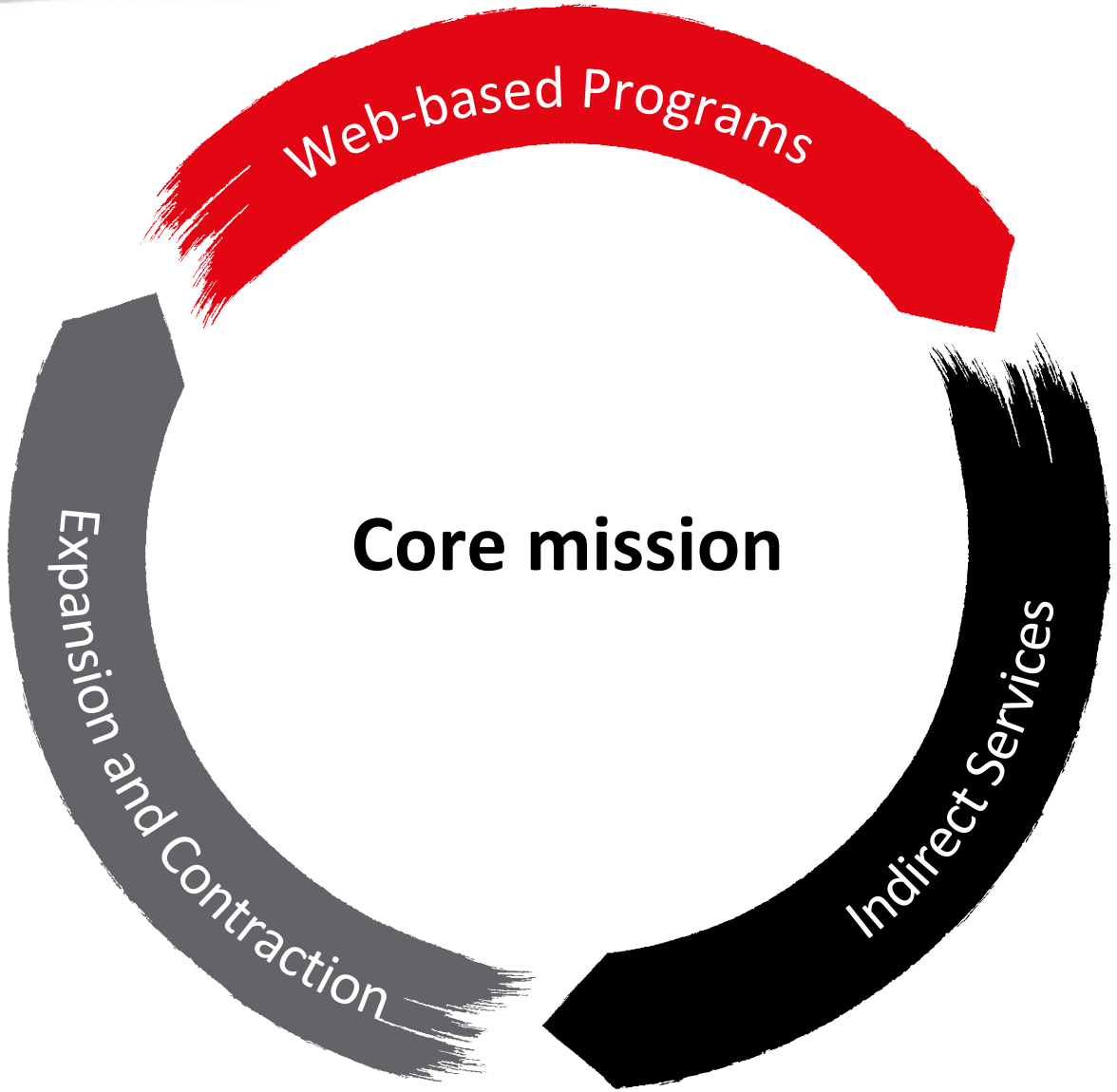
Source: JLL, April 2020

Implement
Forward
Leaning
Strategies

Create a flexible, technology-driven service delivery model

How to be forward-leaning?

- Government staff focuses on core mission
- Variable private sector labor supports indirect services such as facilities management, supply chain logistics, IT, real estate portfolio management and other “non-core” functions
- Allows for services to expand and contract based on needs
- Expand web-based programs, services, and applications where possible
  - Prioritize digital based services like absentee ballot requests, building permits, housing complaints to web-based platforms



Create a digital workplace

How to be forward-leaning?

Evaluate opportunities for your organization to thrive in a range of environments

Secure
file sharing

Mobile
applications

Smart
building technologies

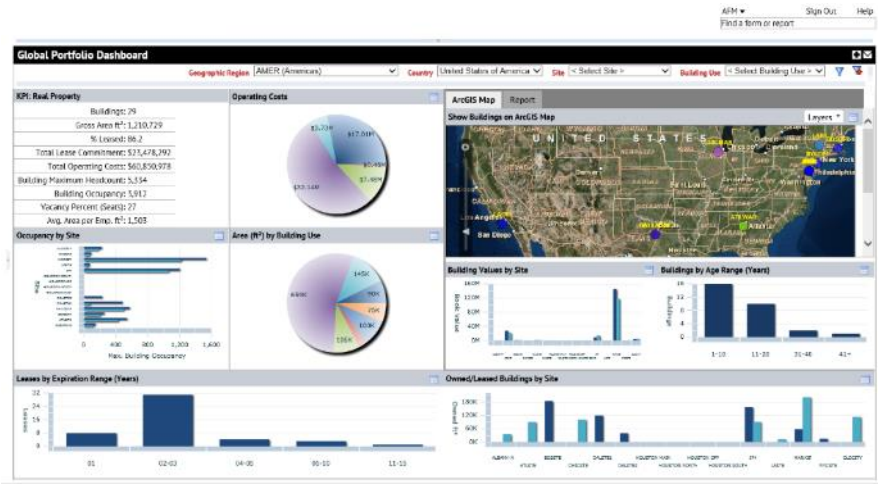
Real
time data

Create a flexible, technology-driven service delivery model

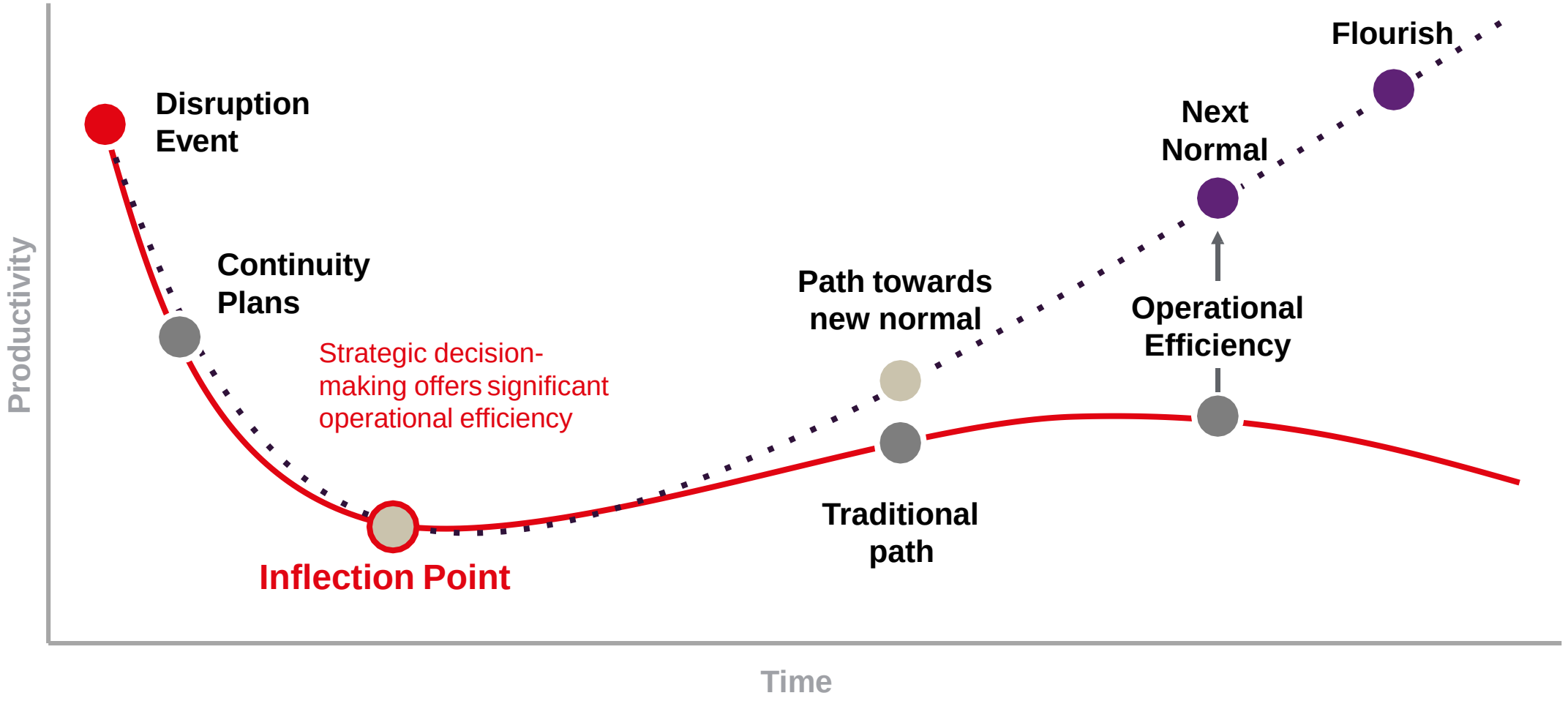
How to be forward-leaning?

Adopt future-fit workplace and real estate strategies

- Value of knowing your portfolio down to available rooms, cleaning schedules, and what staff work in which buildings or spaces will be critical to ensuring workplace confidence
- Integrated Workforce Management Systems (IWMS) will be essential to combine space plans, utilization, costs, and capital planning needs



Looking ahead



Polling question

TO WHAT EXTENT DO YOU FORESEE YOUR CITY OR COUNTY ADAPTING TO A NEW NORMAL? I FORESEE THAT WE WILL…

© 2020 Jones Lang LaSalle IP, Inc. All rights reserved.

The new normal

For cities and counties to flourish, this is an opportunity to (re)focus on your core missions, your constituents, your employees and places of work.

© 2020 Jones Lang LaSalle IP, Inc. All rights reserved.

Questions?

Get our Government return-to-work guide at:

us.jll.com/return-to-work

Thank you!

Joe Judge

202 [illegible]581

J[illegible]@a[illegible].com

© 2020 J[illegible]ng LaSalle IP, Inc. All rights reserved.

Disclaimers

© 2020 Jones Lang LaSalle IP, Inc. All rights reserved. This presentation has been prepared solely for informational purposes. The presentation is confidential and may not be reproduced. The contents of this presentation are not to be construed as legal, accounting, business or tax advice.

About JLL:
JLL (NYSE: JLL) is a leading professional services firm that specializes in real estate and investment management. JLL shapes the future of real estate for a better world by using the most advanced technology to create rewarding opportunities, amazing spaces and sustainable real estate solutions for our clients, our people and our communities. JLL is a Fortune 500 company with annual revenue of $18.0 billion, operations in over 80 countries and a global workforce of more than 93,000 as of December 31, 2019.

JLL is the brand name, and a registered trademark, of Jones Lang LaSalle Incorporated. For further information, visit jll.com. The information contained herein is proprietary and confidential and may contain commercial or financial information, trade secrets and/or intellectual property of JLL and/or its affiliates. Although the information used in this presentation was taken from sources believed to be reliable, there is no representation, warranty or endorsement (expressed or implied) made as to the accuracy, reliability, adequacy or completeness of any information or analysis contained herein. JLL expressly disclaims any and all liability that may be based on such information, errors therein or omissions there from.

Certain information in this presentation constitutes forward-looking statements. Due to various risks, uncertainties and assumptions made in our analysis, actual events or results or the actual performance of the types of financing and values covered by this presentation may differ materially from those described. The information herein reflects our current views only, are subject to change, and are not intended to be promissory or relied upon.

The outbreak of the COVID-19 virus (novel coronavirus) since the end of January 2020 has resulted in market uncertainty and volatility. While the economic impact of a contagion disease generally arises from the uncertainty and loss of consumer confidence, its impact on real estate values is unknown at this stage. Given the prevailing domestic and global uncertainty arising from the Coronavirus, we recommend that the intended users of this report regularly seek our guidance.

© 2020 Jones Lang LaSalle IP, Inc. All rights reserved.