Can't Get No Satisfaction:

Going Beyond Opinion to Create Meaningful Workplace Assessments

presented by
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Today's Plan

- **Benefits**
- **Rich Data**
- **Apply**
- **Review**

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You are a busy person!
Why should you give yourself more work?

Assessments Promote the FM Role

- Integrate and elevate role of facilities manager as business adviser
    - Save $$$ with upfront planning
    - Gain time for execution
    - Post-project adjustments
    - Drive portfolio management decisions
- Know what your clients want!!!

Assessments Can Help Promote Alignment

- **Senior Leaders**
  - Attract and retain top talent
  - Drive employee engagement
  - Manage/Limit operating expenses
- **Organizational Priorities**
  - Deliver the mission
  - Increase innovation
- **Project Goals**
  - Increase capacity
  - Reduce footprint

- **Senior Leaders**
  - Foster a positive and engaging workplace culture through proximity, collaboration, social and professional interaction.
- **Organizational Priorities**
  - Establish expertise in workplace strategies and innovations to better deliver to our customers.
- **Project Goals**
  - Meet 150 target

Assessments Support Workplace Change

- **Generate** material for change communication plans

- **Identify** "hidden" issues

- **Provide** opportunity for leadership support

- **Eliminate** incorrect assumptions

- **Inform** design choices

- **Show** responsiveness to people in organization

- **Establish** credibility with stakeholders

Other Benefits of Workplace Assessments

- Inform Scope and Project Plan

- Interpret Utilization of Space

- Improve Space in Post-Occupancy Phase

Assessments Create Rich Data

Rich Data

*both **qualitative** and **quantitative** data sufficient in depth to reveal the complexities of the subject studied*

Rich Data Clarifies "Muddy" Requests

Assessments Provide Metrics!

Typical Metrics

- Project Cost per Person
- Operating Expenses Cost Savings
- Satisfaction
- Productivity
    - Client MUST define this metric for you
    - Performance evaluations owned by HR

Unique (and VALID) Metrics

- Space Utilization
- How / Why of Usage
- Attendance
- Satisfaction
    - Noise
    - Project goals met

Assessment Methodologies

1. Surveys
2. Observation Studies
3. Interviews

- Various methodologies allow for different types of data collection. Not all are necessary for each project
- Assessment does not have to be complex or long in duration, just **thoughtful**.

Methodology #1

SURVEYS

a fixed set of questions/queries given to a group of individuals to collect uniform data on a range of related topics

Surveys

- **Identify** your Audience for the results when planning your survey - what is important to your decision-makers?

- **Define** "success" criteria for project, **then** create question set to provide data on those items.

- **Collect** actual, not anecdotal evidence. Ask for specific feedback, not broad judgments. Example: do not ask if users "like" their workplace.

Surveys – Areas of Inquiry

- **Workspace categories**: primary workspace, storage, activity spaces, facility (plan and condition), amenities, and hospitality (food, coffee, etc).

- Good opportunity to gather information for **pending/future initiatives**: flex-work, technology refresh/implementation, relocation

- Avoid jargon. "Workstation typicals" "floorplan" "design" "floorplate" "adjacencies" are a few examples.

- Important: **do not** ask questions to which you do not want answers.

- Communication preferences (support change management)

Surveys - Data Integrity and Participation

- Accuracy!

- Ask ONE question at a time. If your question has "and" or "or" in the wording, you are asking more than 1 question and you won't have a clear answer!

- Anonymous collection promotes candid feedback.

- Survey sample is a representative group of users: Age, gender, tenure, role, department, function, etc.

- Ask demographic information at the END.

Surveys - Question types

- **Multiple Choice**: drop-down or radio button

    - Factual information: location, department, workstation type (cubicle, office, home-based, other)

- **Ranked**: "choose your top three…"

- **Multi-point Rating** (Strongly Disagree-Strongly Agree)

    *Determine which questions are **critical** and make those required*

Surveys – Weighted Matrix

- Weighted ranking

- Useful in a matrix to quickly collect data regarding multiple questions on a related topic, eg "workstation"

- For a weighted matrix, you should decide if you want a neutral option, such as:

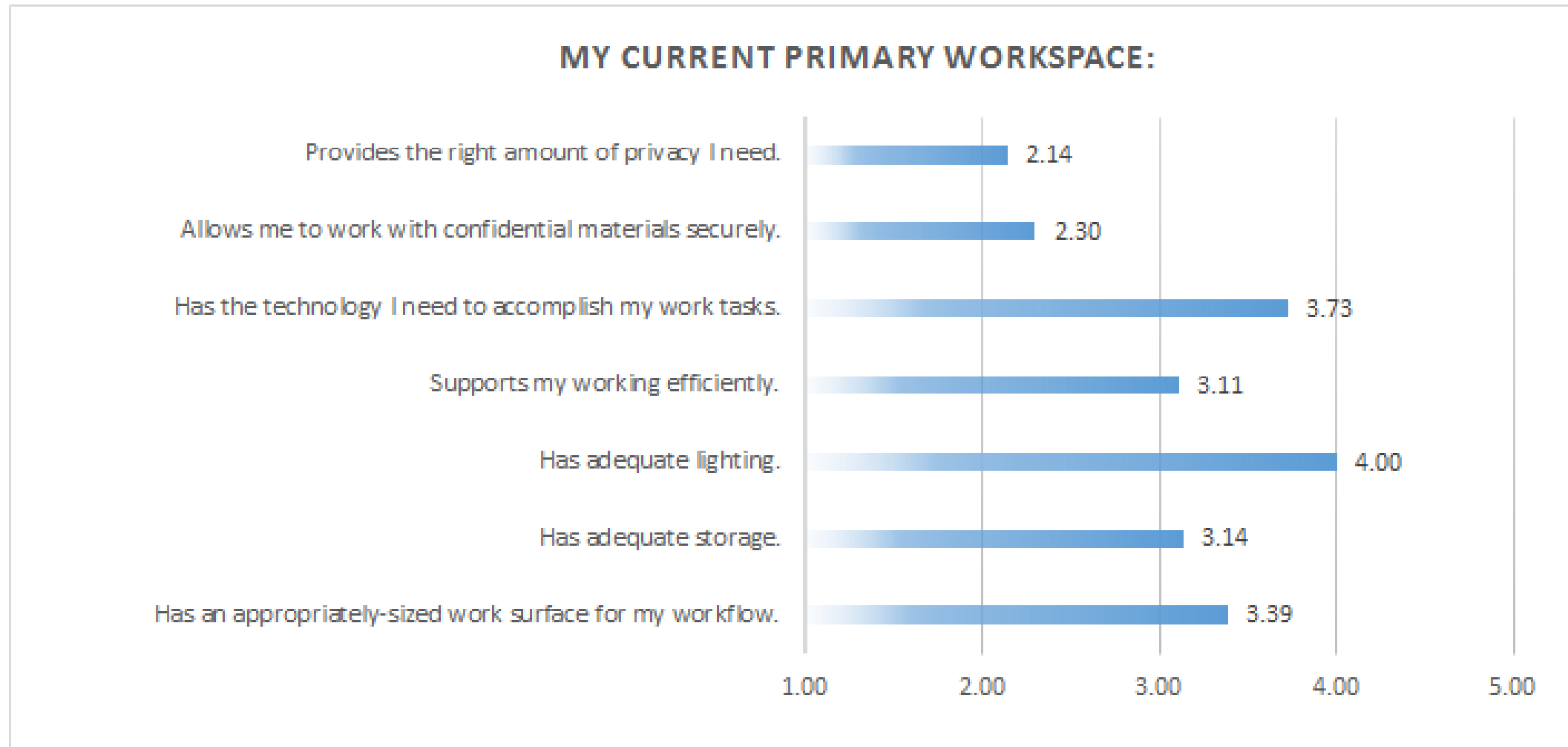| Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	N/A
○	○	○	○	○	○

- Also, think carefully about your work environment and if 'N/A' is a necessary option. Another option is "Don't care/Not Important."

Surveys - Weighted Multi-Point Matrix

2. My current primary workspace:

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	N/A
Has an appropriately-sized work surface for my workflow.	○	○	○	○	○	○
Has adequate storage.	○	○	○	○	○	○
Has adequate lighting.	○	○	○	○	○	○
Supports my working efficiently.	○	○	○	○	○	○
Has the technology I need to accomplish my work tasks.	○	○	○	○	○	○
Allows me to work with confidential materials securely.	○	○	○	○	○	○
Provides the right amount of privacy I need.	○	○	○	○	○	○

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Surveys - Weighted Multi-Point Matrix Results

MY CURRENT PRIMARY WORKSPACE:

Provides the right amount of privacy I need.	2.14
Allows me to work with confidential materials securely.	2.30
Has the technology I need to accomplish my work tasks.	3.73
Supports my working efficiently.	3.11
Has adequate lighting.	4.00
Has adequate storage.	3.14
Has an appropriately-sized work surface for my workflow.	3.39

1.00   2.00   3.00   4.00   5.00

Other Question Examples

Surveys - Planning Questions

9. When I want to meet with others, I *most often* need a space that accommodates:

- ○ 1-2 people

- ○ 3-4 people

- ○ 5-7 people

- ○ 8-10 people

- ○ 12 or more people

Comments

Surveys - Behavior Question

5. I am distracted by the following:

	Never	Rarely	Sometimes	Often	Frequently
People stopping by to talk to me.	○	○	○	○	○
People talking near me.	○	○	○	○	○
Meetings near me.	○	○	○	○	○
Email.	○	○	○	○	○
Instant messages.	○	○	○	○	○
Phone calls.	○	○	○	○	○

Comments:

Surveys - Summary Questions

It is important to have 1 or 2 questions that will provide a generalized opinion of the workplace. These will become your "go-to" data points for all future discussions.

Sample weighted questions:

- *Overall, the condition of my current office reflects the QUALITY of our work (walls, paint, carpet, fixtures, etc.)*

- *Overall, the design of my current office reflects the CULTURE and CHARACTER of our company. (color, furniture, lighting, etc.)*

Summary Question Response Examples

"Dilapidated, out of touch, and stodgy?!?!?! ;)"

"The space is very traditional and does not reflect our journey/desire to be more innovative and engaging."

"I work in a "cube farm". I'd say it reflects the following traits: Old, standardized, regimented and dull."

"We ask for best-in-class results, but the office is sub-par."

Survey - Execution

- **How long?** 2 full working weeks

- **Who approves?** HR,, sometimes legal, IT (esp. for web-based tools), Labor Relations

- **How do you implement?**
  - Email: launch, mid-term reminder, last-chance
  - Consider the sender - use an executive if helpful

- **Who participates?** goal is **80% or better**
  - Offer incentives

- **How to execute?** Google Forms, SurveyMonkey, marketing system (Emma, Constant Contact, etc.)

Surveys: Pre- and Post-Occupancy

- **Pre**: Establish baseline data, provide snapshot of current conditions, highlight issues for planning purposes

  - "What do we need to do in the future?" "What needs to be addressed NOW?"

- **Post**: Compare against previous conditions, allow for goal measurement (6 months post-move, and again at 1 year)

  - "How did we meet our criteria for success?" "What needs to be addressed NOW?"

  - "What should we do differently next time?" (aka "Lessons Learned")

Methodology #2

OBSERVATION STUDIES

data reflecting actual usage and behavior

Observation Studies

- **Why**
- **What**
- **How**

→

- Complete and **accurate measurement of usage**
  - vs. auto systems
  - Verify other data
- Social interactions

Observation Studies

What about the workplace do you want to measure?

Build Community
Foster a positive and engaging workplace culture through proximity, collaboration, social and professional interaction

Provide Flexibility
Enhance workforce productivity and morale by giving associates choice to work anywhere and anytime

Utilization / Usage

Observation Studies – Popular Measurements

- Workplace Census
- Workstation Utilization
- Popular Spaces
- Conference Room Usage
- Collaboration

Observation Studies - Required Resources

- **Observation Study Team**
  - Observers
    - At least 1 per 25,000 sq. ft.
  - Analytics
- **Data Collection Requires**
  - Time
  - Consistency
  - Accuracy
  - Keen observational skills

Observation Studies - Data Collection

- **Schedule**
  - Duration and Checks
- **Locations**
  - Consistent personnel and rhythm
- **Collecting Information**
  - # of people and observations
  - Don't be afraid to interact!
- **Data Format**

Observation Studies – Digital Capture Sample

Seat	Group	Monday				Tuesday				Wednesday				Thursday				Friday			
		9:00	10:30	12:00	2:00	9:00	10:30	12:00	2:00	9:00	10:30	12:00	2:00	9:00	10:30	12:00	2:00	9:00	10:30	12:00	2:00
1		1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	1	0	0	0	0
2		0	0	0	0	0	0	0	0	0	0	0	0	0	1	0	0	0	1	2	1
3		0	1	1	1	1	1	1	1	1	1	0	1	0	0	0	0	0	0	0	0
4		1	1	1	1	0	0	0	0	1	1	0	0	0	0	1	0	1	0	0	0
5		1	1	0	1	1	1	0	1	1	0	0	1	1	0	0	1	1	1	1	0
6		0	1	0	0	0	0	0	0	0	1	0	1	0	0	0	1	0	0	0	0
7		0	0	0	0	1	1	1	0	1	0	0	0	0	0	1	1	0	0	0	0
8		0	0	1	1	0	0	0	0	0	0	0	0	0	1	1	0	0	0	0	0
9		0	0	0	0	0	0	1	0	0	1	0	1	0	0	0	0	0	0	0	0
10		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
11		0	0	0	0	1	1	1	1	0	0	0	1	1	1	1	0	0	0	0	0
12		1	0	0	0	1	1	1	1	1	0	0	1	1	1	1	0	0	0	0	0
13		0	1	0	1	0	0	0	0	0	0	0	1	0	1	0	0	0	0	0	0
14		0	1	0	0	0	0	0	0	0	0	0	0	0	1	0	0	0	0	0	0
15		0	0	0	0	0	0	0	0	0	0	0	0	1	0	0	0	0	0	0	0

Observation Studies – Don't Forget...

- **Notify Stakeholders**

- **Fulfill HR and Labor Obligations**

- **Give yourself plenty of time for data analysis**
  - Make friends with business analysts
  - Don't be afraid to ask more questions

Observation Studies

What about the workplace do you want to measure?
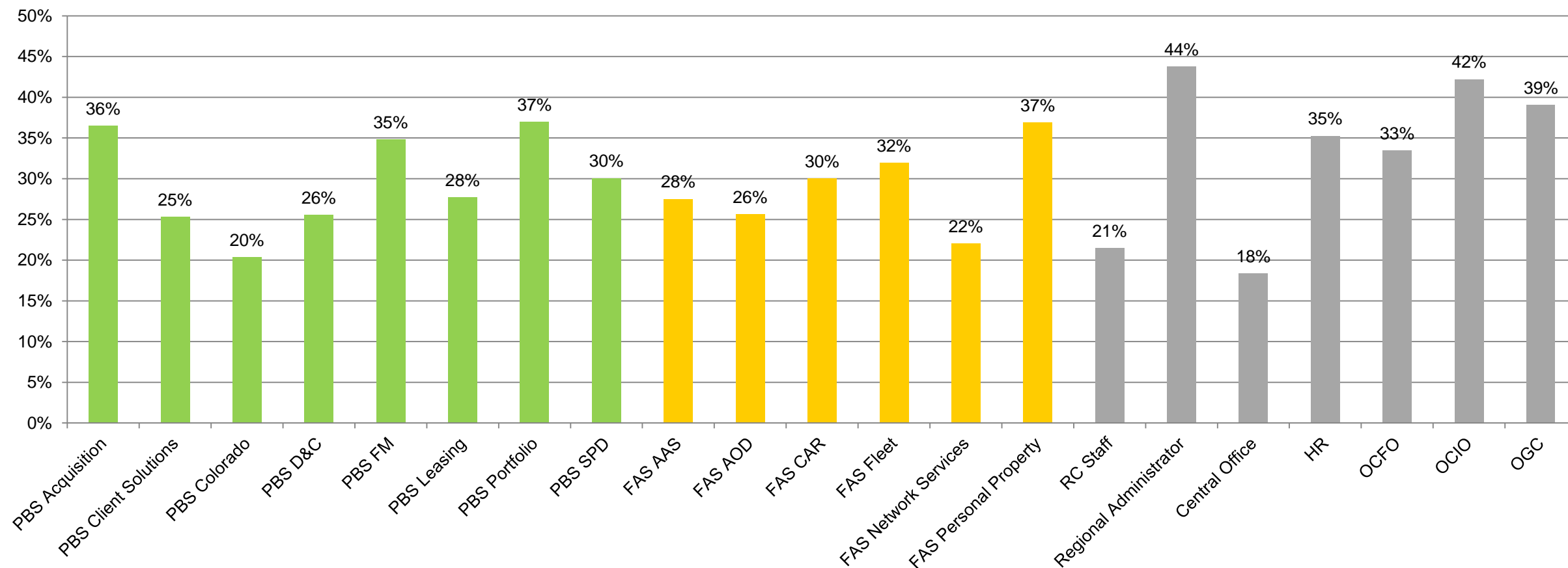
Build Community
Foster a positive and engaging workplace culture through proximity, collaboration, social and professional interaction
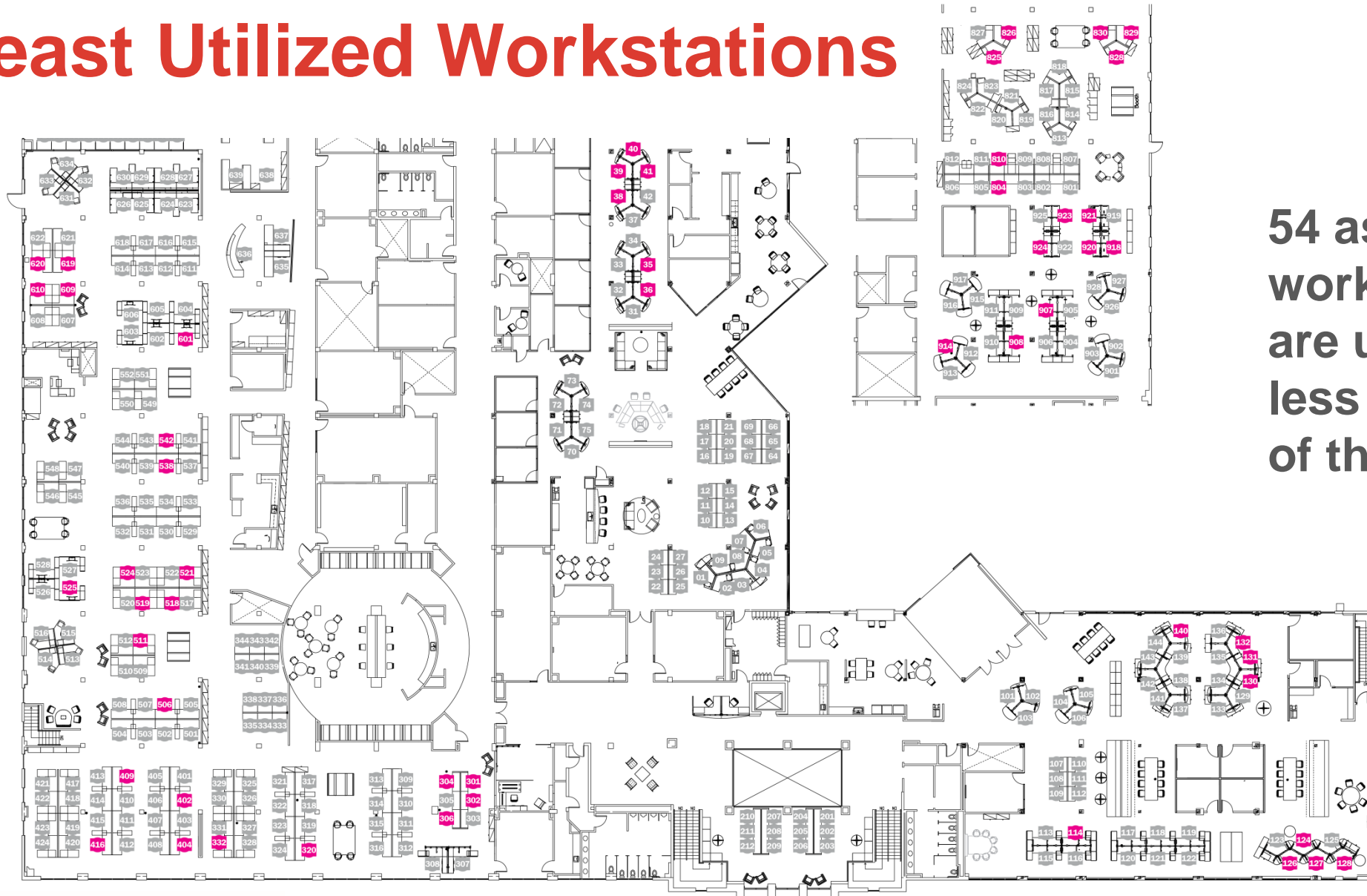
Provide Flexibility
Enhance workforce productivity and morale by giving associates choice to work anywhere and anytime

Utilization / Usage

Utilization / Usage Results

Bar chart showing utilization/usage percentages by category:

| Category	Value
PBS Acquisition	36%
PBS Client Solutions	25%
PBS Colorado	20%
PBS D&C	26%
PBS FM	35%
PBS Leasing	28%
PBS Portfolio	37%
PBS SPD	30%
FAS AAS	28%
FAS AOD	26%
FAS CAR	30%
FAS Fleet	32%
FAS Network Services	22%
FAS Personal Property	37%
RC Staff	21%
Regional Administrator	44%
Central Office	18%
HR	35%
OCFO	33%
OCIO	42%
OGC	39%

Least Utilized Workstations

54 assigned workstations are utilized less than 15% of the time

Collaboration

About 40% of B41 workforce is engaged in **collaborative** activity at any given time, Monday through Thursday.

Collaborative vs. Solo Work

	Mon	Tues	Weds	Thurs	Fri
■ Coll %	36%	39%	41%	46%	26%
■ Solo %	64%	61%	59%	54%	74%

Percentage Breakdown
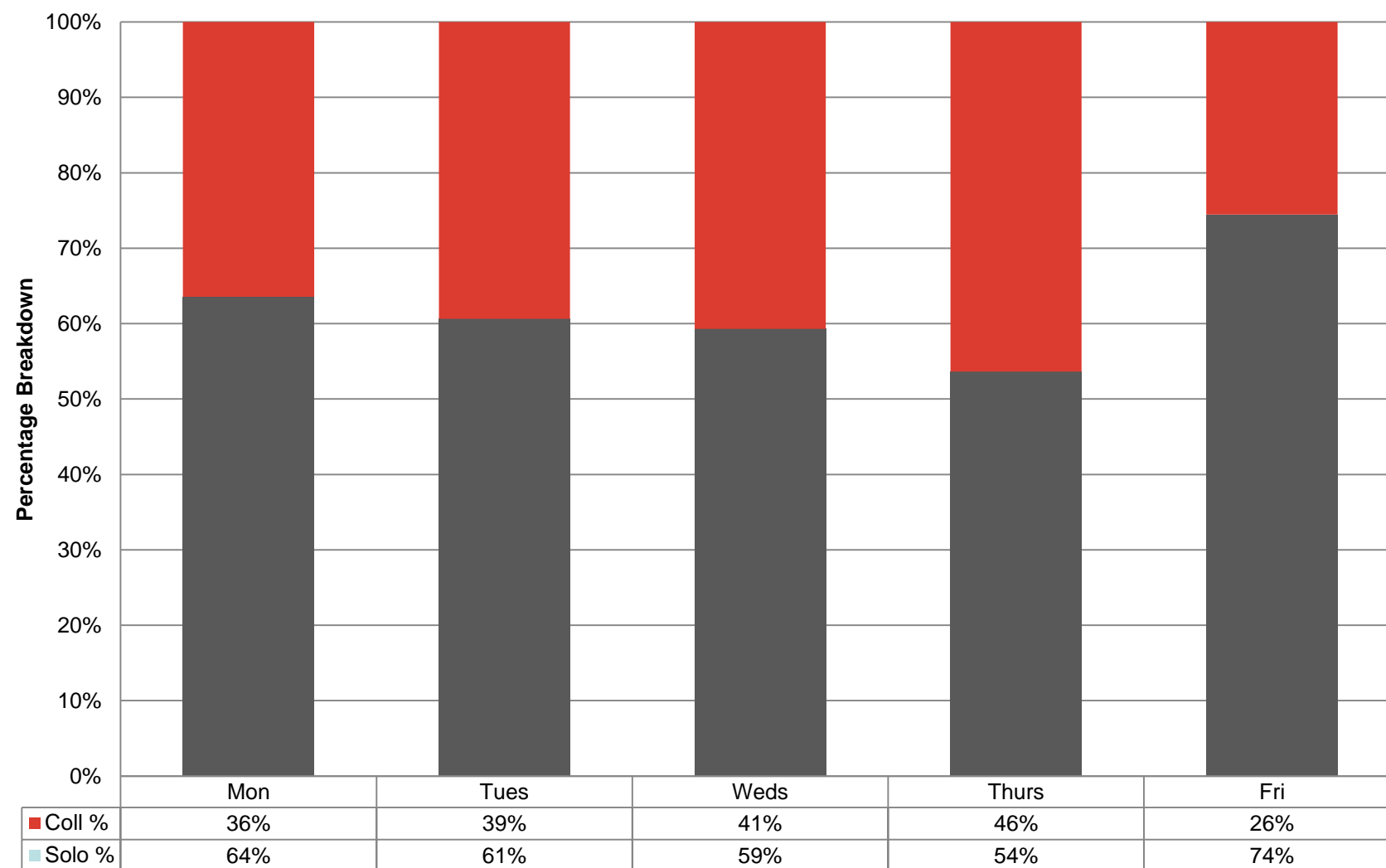
Methodology #3

INTERVIEWS

*intentional, nuanced discussions on a set topic
with general guidelines for investigation*

Interviews

- **Q&A**
  - Mostly listening
- **Fill in Gaps**
  - "Why?"
  - "Tell me more about that…"
  - "What is more important: x or y…?"
- **Change Management**
  - Persuade opponents
  - Respect hierarchy, both formal and informal

Interview Guidelines

- **Standardization**
  - Targeted interview groups
  - Demographics
  - Managerial vs. Direct reports
- **Intentional Questions**
  - Develop after reviewing other data sets
  - Be consistent!
  - Align questions with previously-established goals
- **Roles**
  - Interviewer vs. Note taker

Do You Have RICH DATA?

	Assessment Data	Rich Data?
Project 1	• Survey only	✖
Project 2	• Surveys w/ verbatims	✓
Project 3	• Interviews only	✖
Project 4	• Observation • Surveys w/ verbatims	✓
Project 5	• Observation • Interviews	✓
Project 6	• Surveys w/ verbatims • Observation • Interviews	✓

Act On Results!!!

- **Tell A Story**
  - Synthesize Data
  - Align with organizational goals
- **Communicate Back**
  - Leaders and Clients
  - Audience, Methods, Specifics
- **Showcase Your Value**
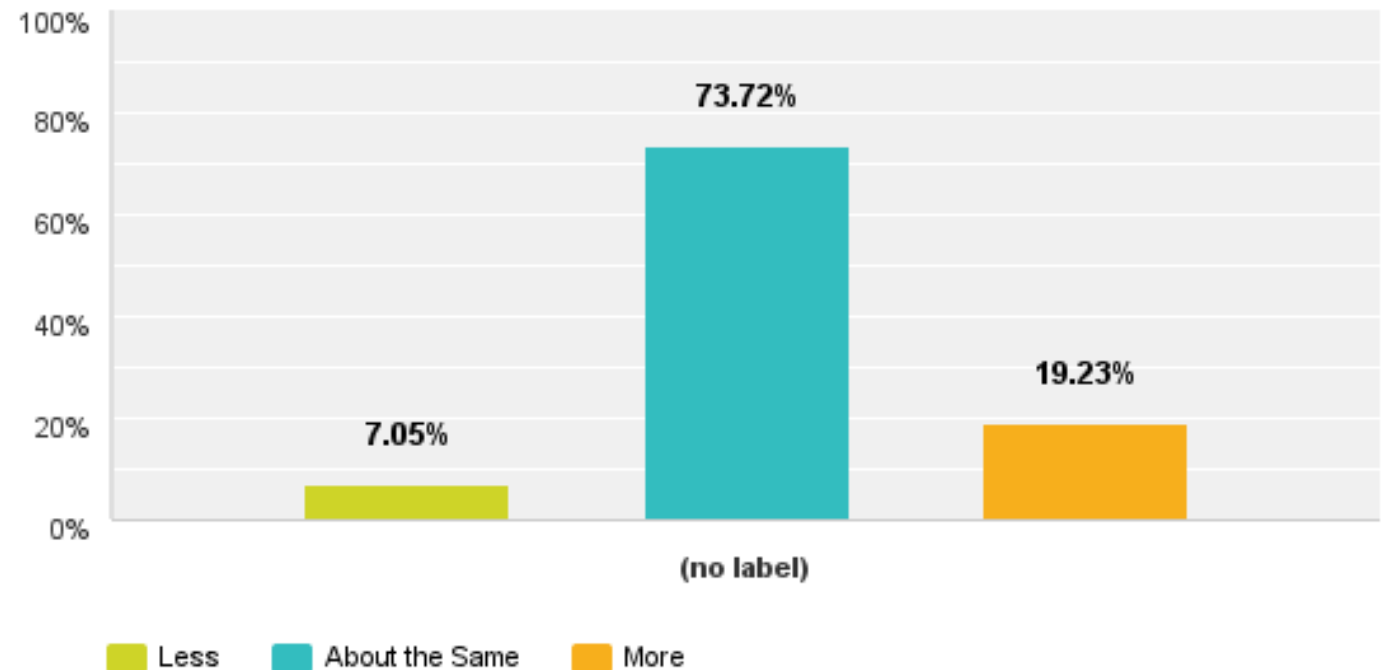
Tell A Story: Community

"Even if we meet all of our real estate measures, the project won't be a success if we drive everyone to telework."

- GSA Executive

79% no change or less

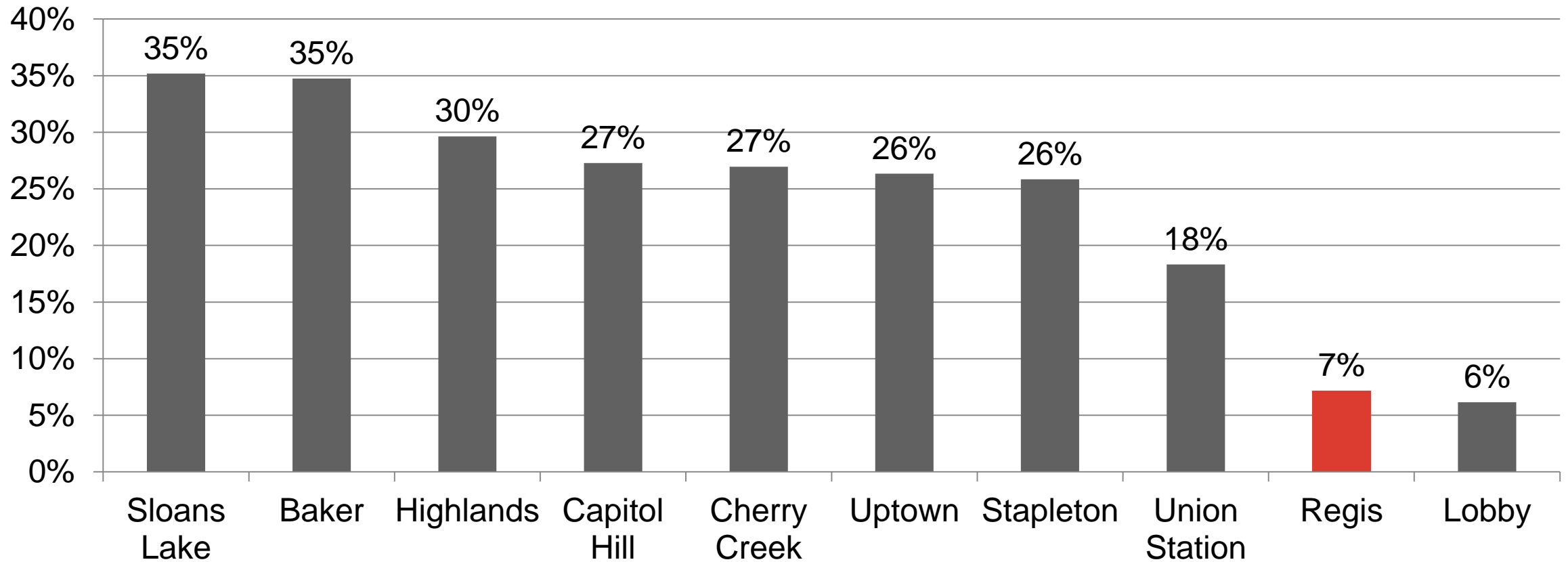Q4 **Since moving into my new space in B41, my telework activity is:**

Answered: 156   Skipped: 0

Less   About the Same   More

Tell A Story: Noise

- **Pre-Move Interviews**
  - #1 request was "quiet zone"
- **Post-Move Observation Study**
  - Least used area was "quiet zone"
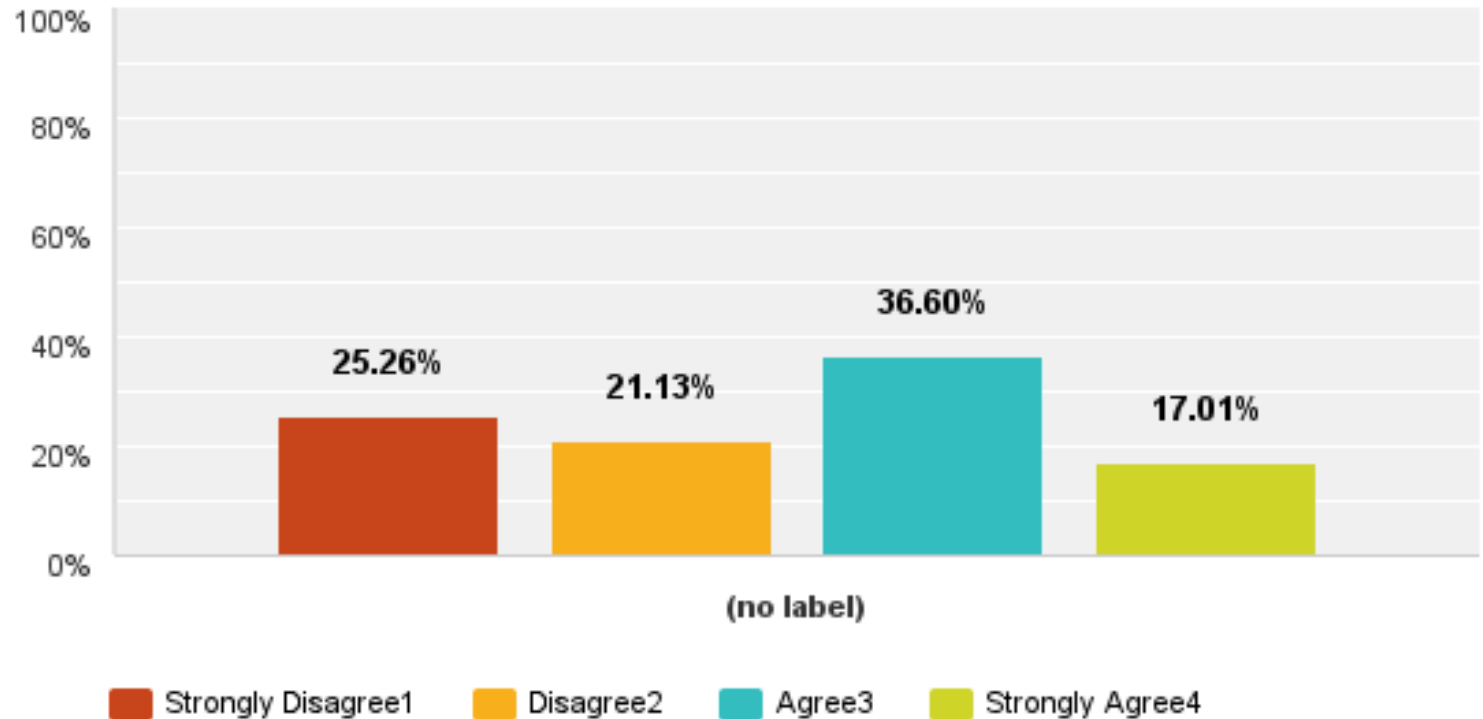
Quiet Zone Utilization

Noise at Workstations

- **53% satisfied**
- **46% unsatisfied**
- **Demographic Data**
  - **Unassigned Associates**
    - 80% satisfied
    - 20% unsatisfied
  - **Assigned Associates**
    - 42% satisfied
    - 58% unsatisfied

Q3 **I am satisfied with the level of ambient noise in and around my workstation.**

Answered: 194   Skipped: 0

| | 25.26% | 21.13% | 36.60% | 17.01% |

Strongly Disagree1   Disagree2   Agree3   Strongly Agree4

(no label)

Noise: So What's the <u>Real</u> Problem?

- **Post-Move Interviews**
  - "I know I could move, but I shouldn't have to."
  - "There aren't enough dual monitors!"
- **Solutions**
  - Change Communications
  - Technology in "Quiet Zone"
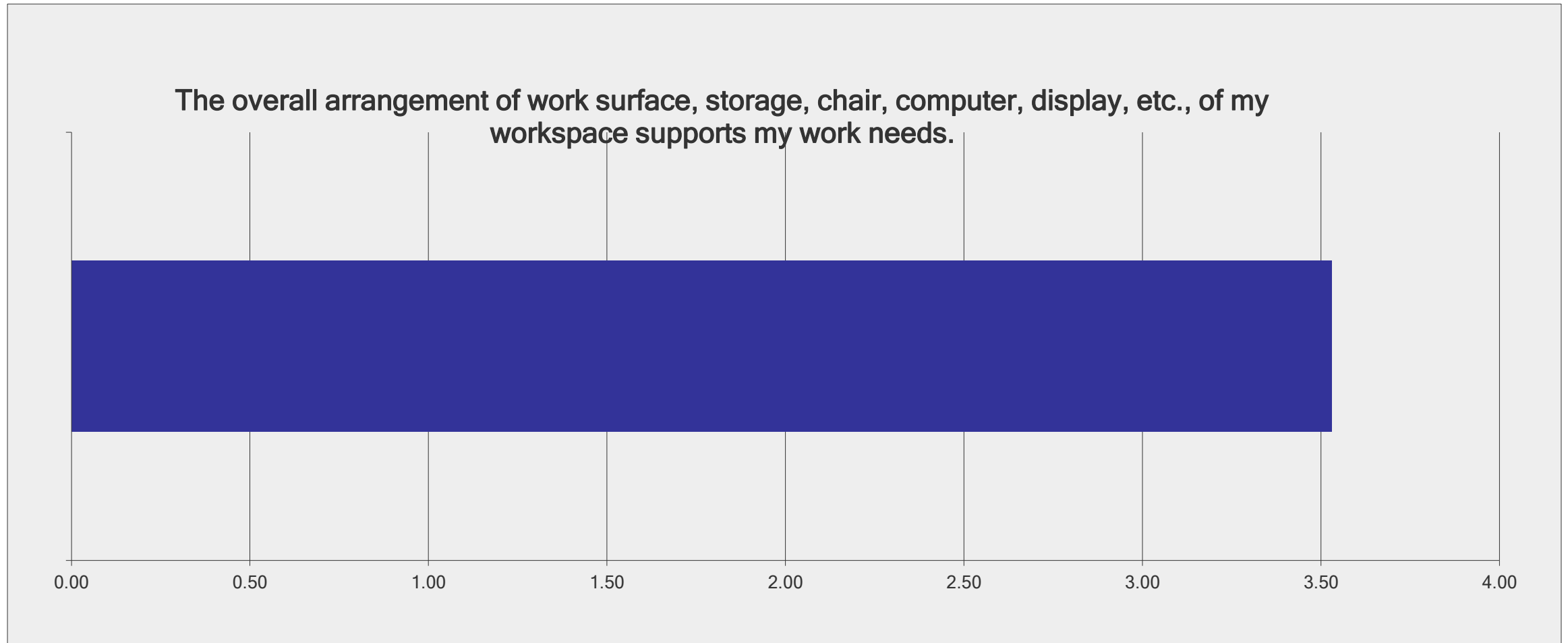 - 30 for 30

Feedback-Driven Change

Insurance Company, Upstate New York

- Moved into a new space; feedback was overwhelmingly negative
- Smaller workstation size, lower cubicle walls
- Complaints of no privacy
- People wanted to work from home because they were unhappy with the space (against policy)

Action Plan: ASSESSMENT!

- Survey
- Small group interviews (focus groups)
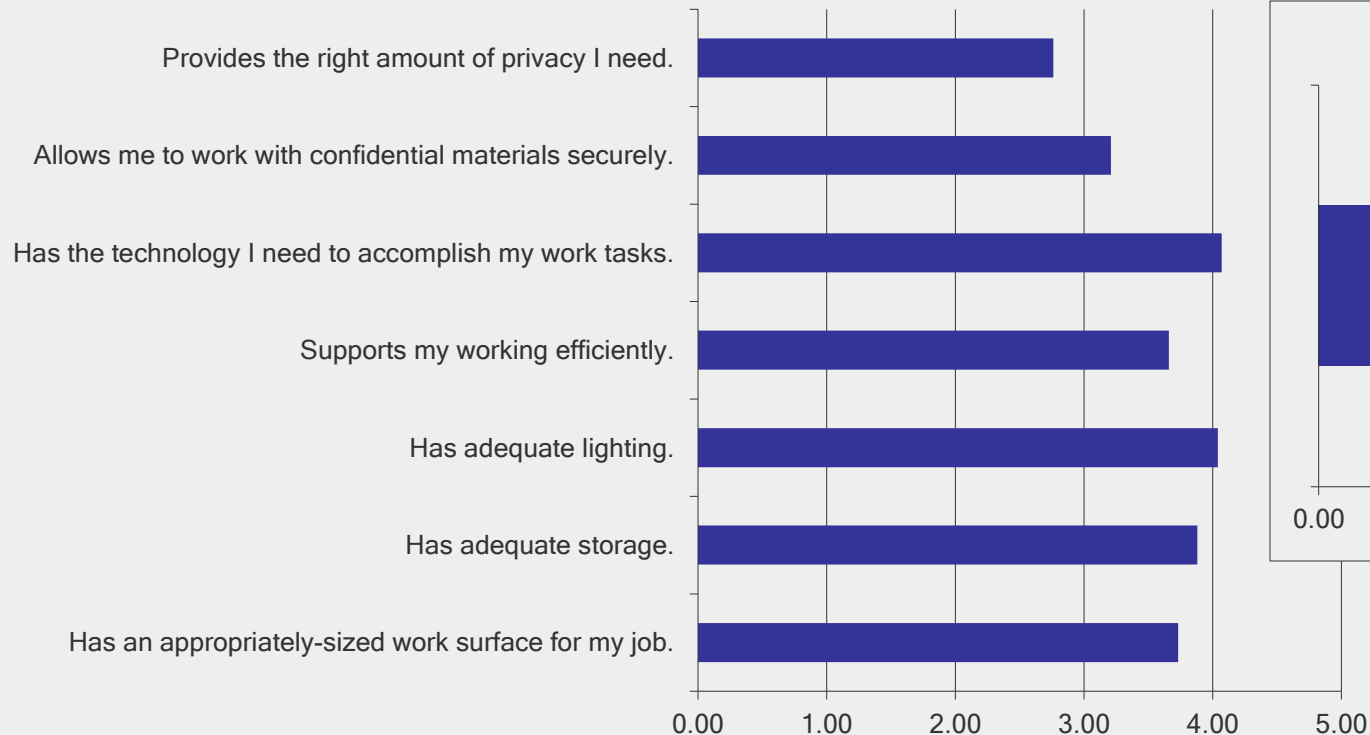
Workstation wasn't the problem

The overall arrangement of work surface, storage, chair, computer, display, etc., of my workspace supports my work needs.

0.00   0.50   1.00   1.50   2.00   2.50   3.00   3.50   4.00

Insurance Company Assessment Results

My current primary workspace:

- Provides the right amount of privacy I need.
- Allows me to work with confidential materials securely.
- Has the technology I need to accomplish my work tasks.
- Supports my working efficiently.
- Has adequate lighting.
- Has adequate storage.
- Has an appropriately-sized work surface for my job.

(Scale: 0.00, 1.00, 2.00, 3.00, 4.00, 5.00)

The overall noise level in the area surrounding my workspace is acceptable.

(Scale: 0.00, 0.50, 1.00, 1.50, 2.00, 2.50, 3.00)

Survey + Interviews Provided Clarity

"Although I don't like it when it's really quiet, it often becomes loud in the area and is very distracting. People are forced to hold conference calls at their desk due to **lack of conference room space**."

"I sit in a very central area. This can be distracting, but it is easy enough to pop in ear buds. On the plus side, I do learn a lot about what is going on with projects and issues, and *more often than not I enjoy the camaraderie*."

I would like to have the option of somewhere I can **go** on the floor which has a workspace with two monitors and also offers a higher level of privacy and lower level of noise for when I need it. "

Key Takeaways

1. Assessments support project validation and workplace change.

2. Assessments don't have to be complex.

3. Choose the methodology that makes sense.

4. Allow sufficient time for data collection and analysis.

5. Behavioral data informs true utilization metrics.

Q & A

THANK YOU

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