

A woman in a white shirt is sitting at a wooden table in a modern office, working on a laptop. The office has large windows that look out onto an outdoor courtyard with people sitting at tables under umbrellas. The scene is bright and sunny.

Gensler

Inside-Out Revolution

Transforming Workplace and Building Infrastructure to Meet Changing Demand

WORKPLACE CHANGE THROUGHOUT THE YEARS



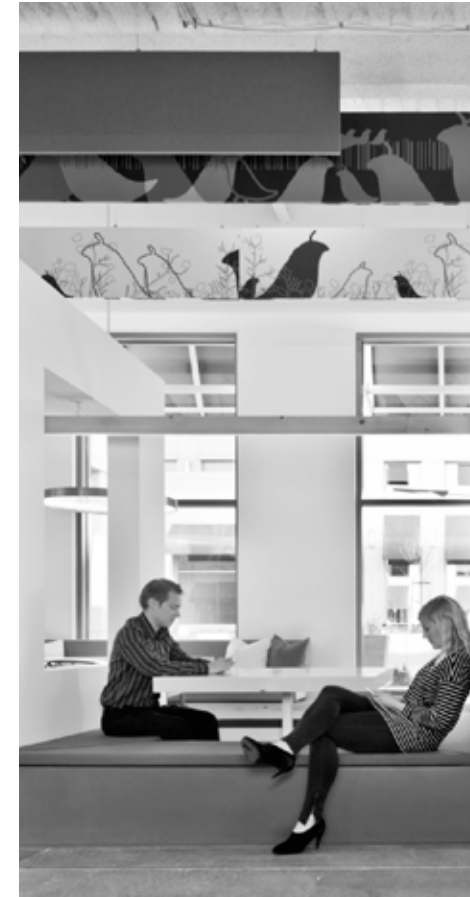
TAYLOR OFFICE
1880–1960



DILBERT WORLD
1960–1995



NEW UNIVERSAL
1995–2003



CONNECTED OFFICE
1998–2011



ACTIVITY-BASED
2011-TODAY

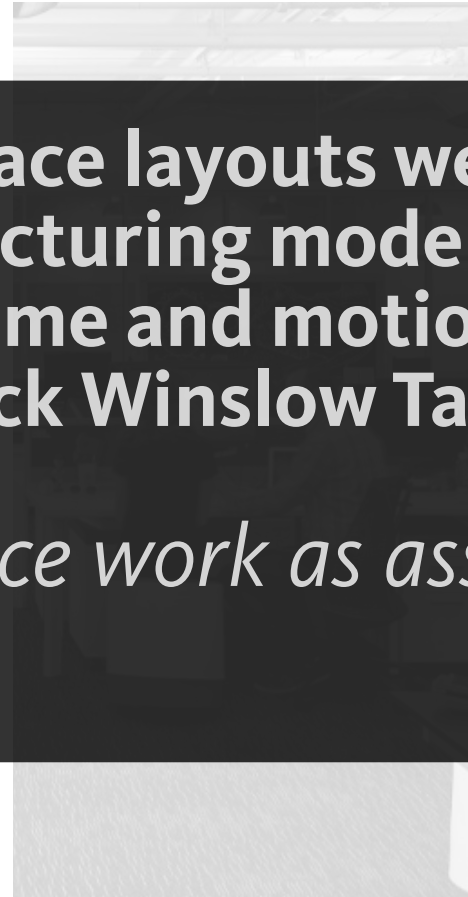
WORKPLACE CHANGE THROUGHOUT THE YEARS



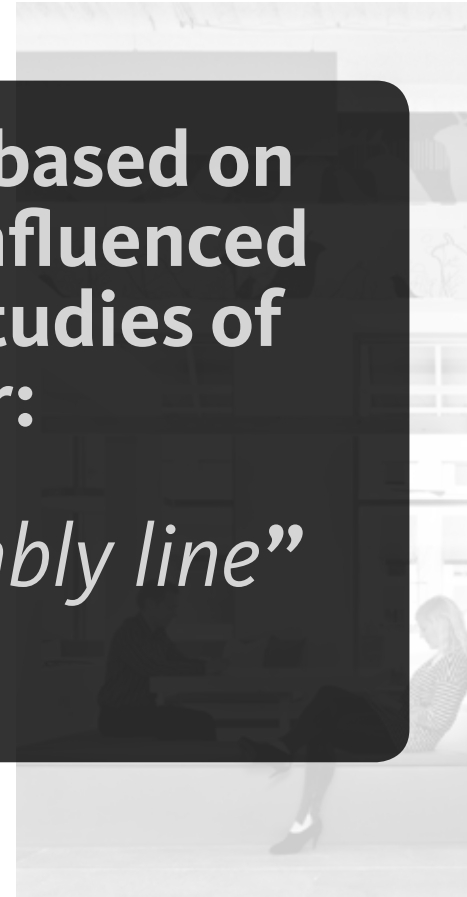
TAYLOR OFFICE
1880-1960



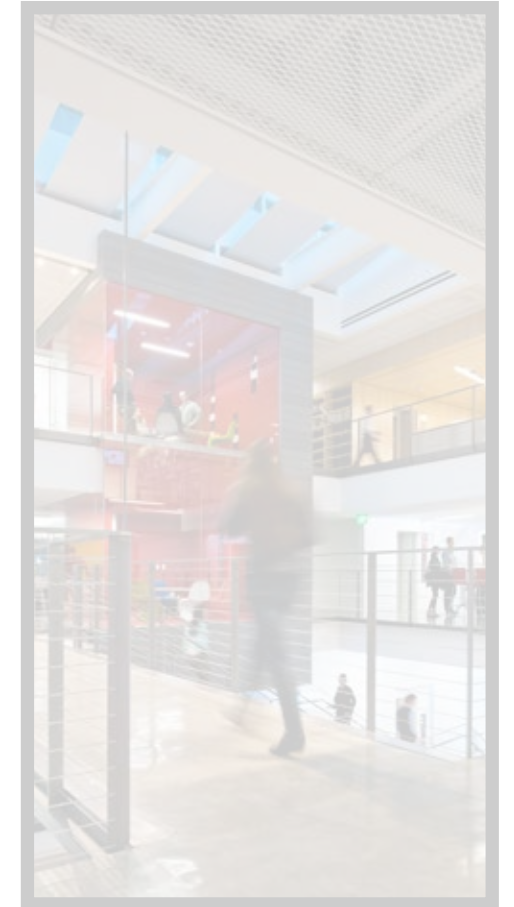
DILBERT WORLD
1960-1995



NEW UNIVERSAL
1995-2003



CONNECTED OFFICE
1998-2011



ACTIVITY-BASED
2011-TODAY

Workplace layouts were based on manufacturing models influenced by US time and motion studies of Frederick Winslow Taylor:

“Office work as assembly line”

WORKPLACE CHANGE THROUGHOUT THE YEARS



TAYLOR OFFICE
1880-1960



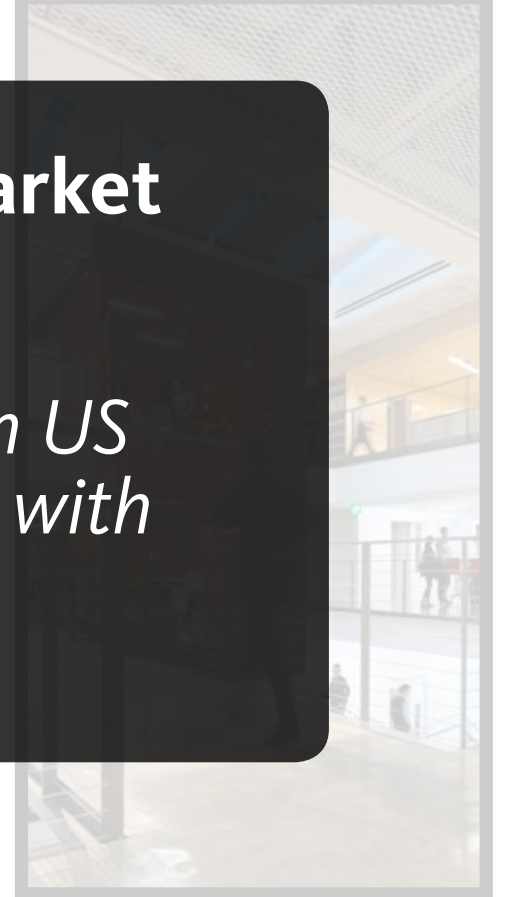
DILBERT WORLD
1960-1995



NEW UNIVERSAL
1995-2003



CONNECTED OFFICE
1998-2011



ACTIVITY-BASED
2011-TODAY

First Cubicle introduced to market in 1963:

“Office Landscape” in Germany introduced in 1950; Introduced in US in 1963 at Federal Reserve in NY with introduction of panel system.

WORKPLACE CHANGE THROUGHOUT THE YEARS



TAYLOR OFFICE
1880–1960



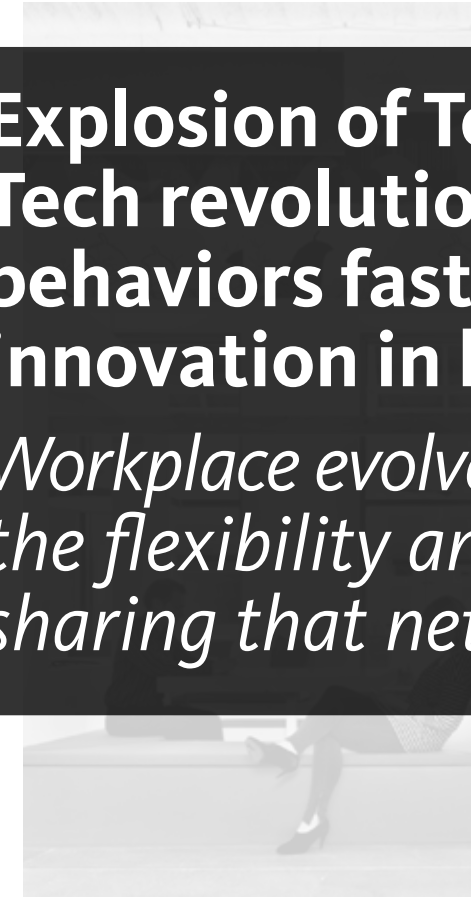
DILBERT WORLD
1960–1995



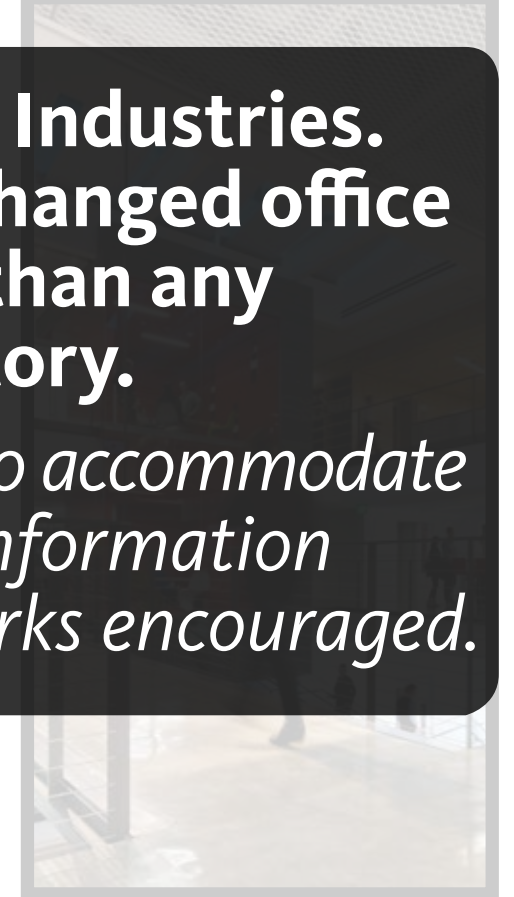
NEW UNIVERSAL
1995–2003

Explosion of Tech Industries.
Tech revolution changed office behaviors faster than any innovation in history.

Workplace evolved to accommodate the flexibility and information sharing that networks encouraged.



CONNECTED OFFICE
1998–2011

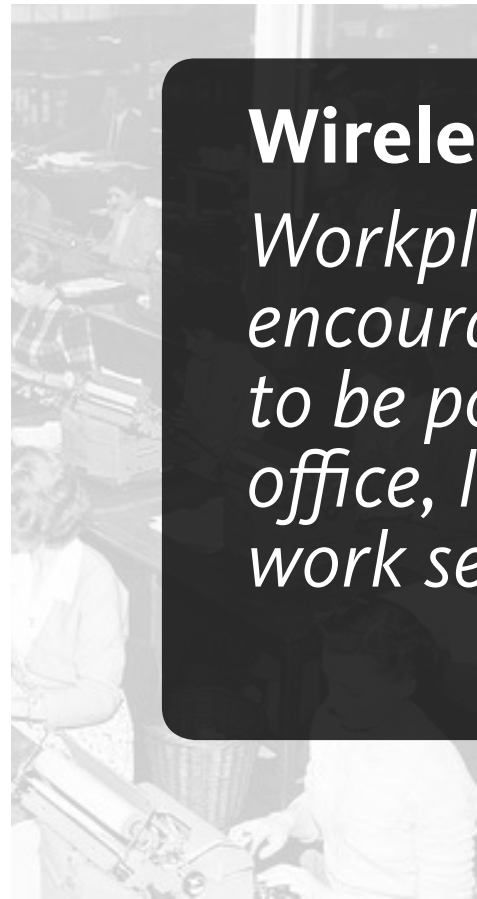


ACTIVITY-BASED
2011-TODAY

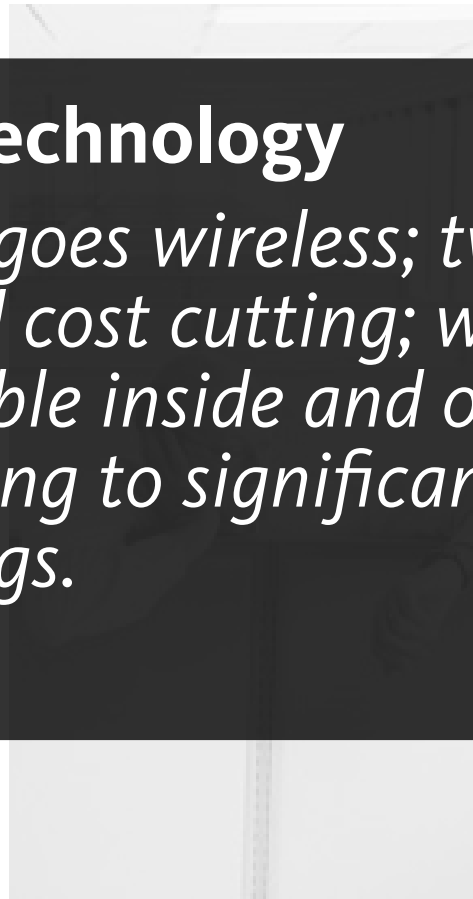
WORKPLACE CHANGE THROUGHOUT THE YEARS

Wireless Technology

Workplace goes wireless; two recessions encouraged cost cutting; work begins to be portable inside and outside the office, leading to significantly changed work settings.



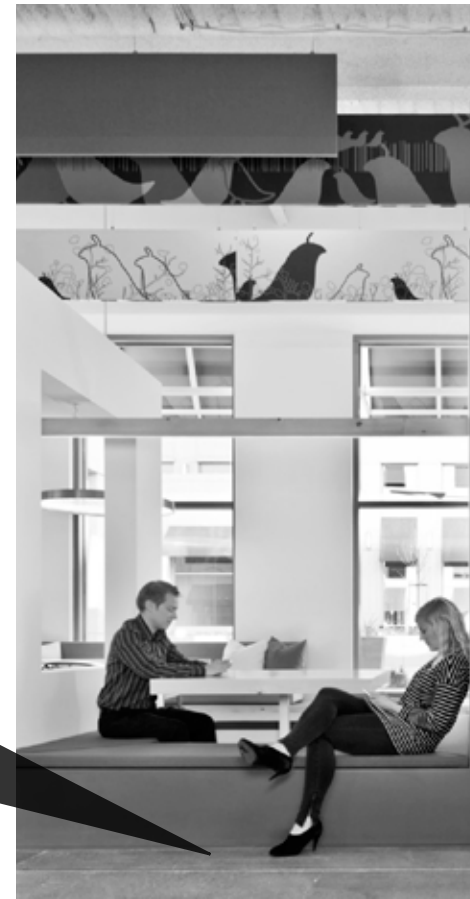
TAYLOR OFFICE
1880–1960



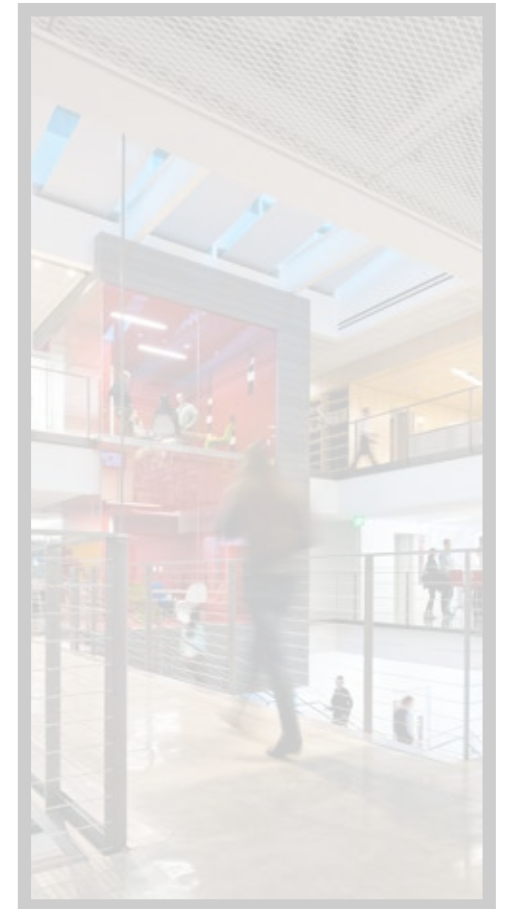
DILBERT WORLD
1960–1995



NEW UNIVERSAL
1995–2003



CONNECTED OFFICE
1998–2011

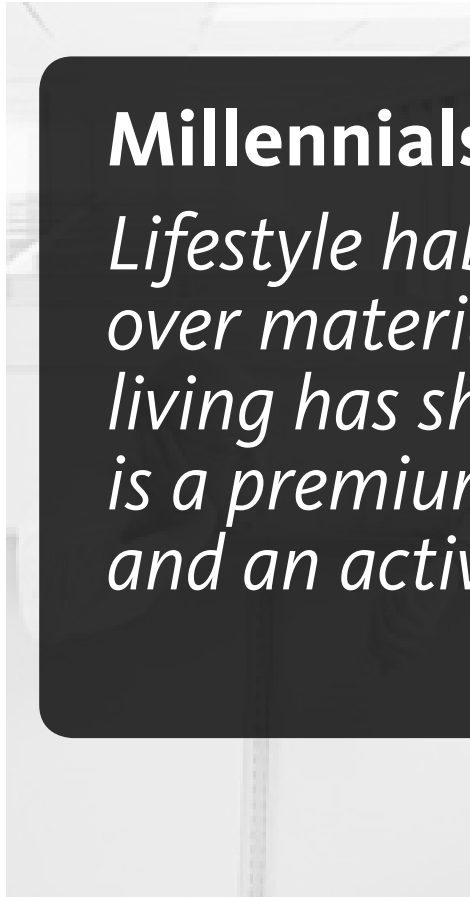


ACTIVITY-BASED
2011-TODAY

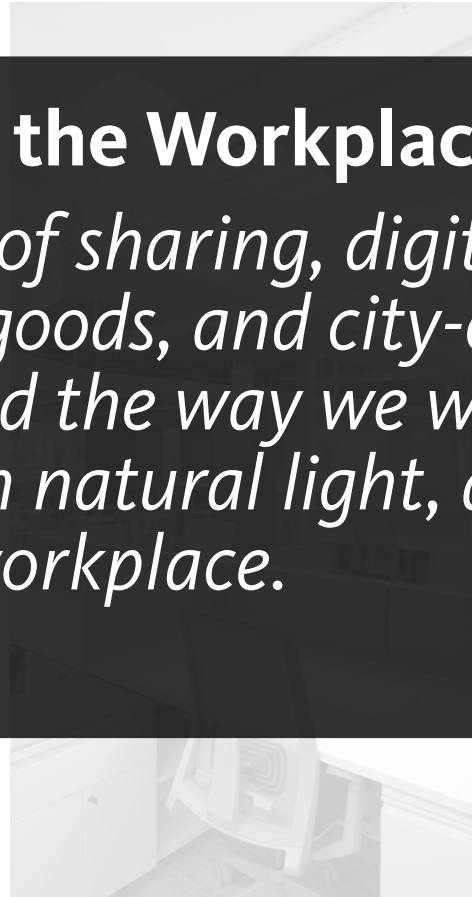
WORKPLACE CHANGE THROUGHOUT THE YEARS



TAYLOR OFFICE
1880-1960



DILBERT WORLD
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CONNECTED OFFICE
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ACTIVITY-BASED
2011-TODAY

Millennials' in the Workplace

Lifestyle habits of sharing, digital goods over materials goods, and city-centered living has shifted the way we work. There is a premium on natural light, amenities and an active workplace.

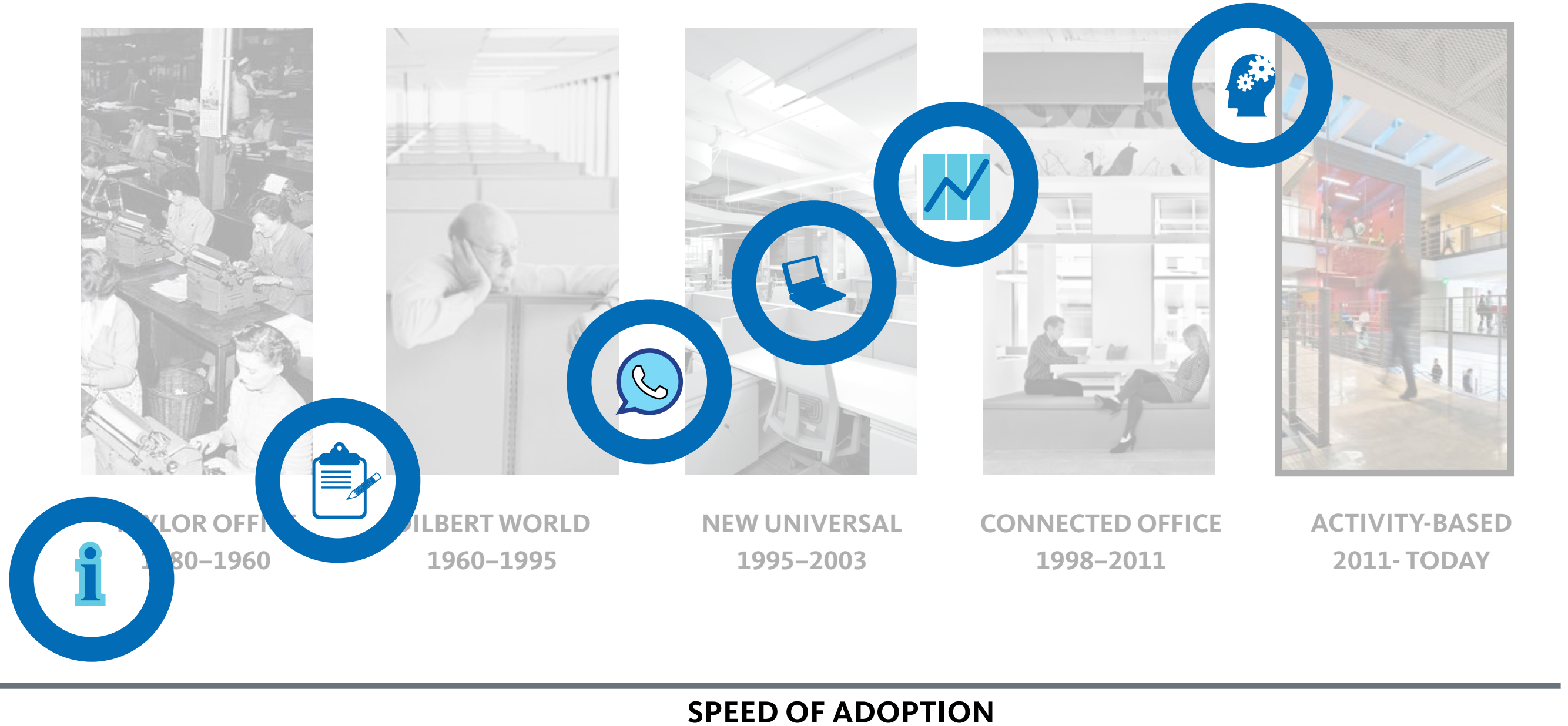
PARADIGM SHIFTS AFFECT ON BUSINESS



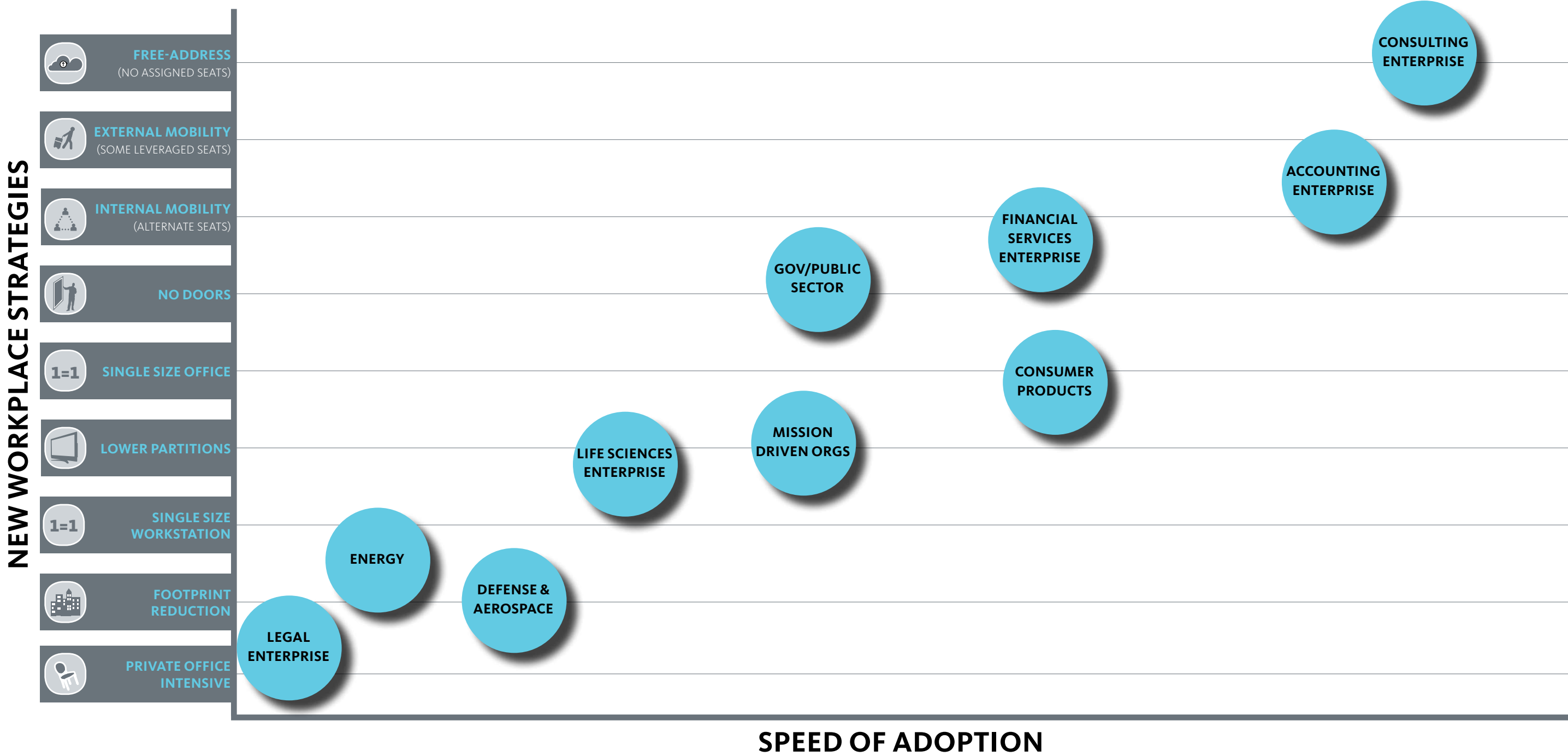
NEW WORKPLACE STRATEGY

WORKPLACE TIME LINES

PARADIGM SHIFTS



RATE OF CHANGE ADOPTION AND ADAPTATION



CAN YOU HEAR
(AND SEE) ME
NOW?

By 2020,
80%

Majority of global
population will have
access to mobile
telephony



THE MILLENNIALS ARE HERE

GENERATION	POPULATION (IN MILLIONS)	PERCENTAGE OF POPULATION
Greatest	35.2	11%
Baby Boomer	80.3	25%
Gen X	40.9	14%
Millennial	86.0	27%
iGen	74.0	23%

Source: U.S. Census, Delta Associates; January 2014.

**FOR THE FIRST TIME IN HISTORY -
TODAY'S WORKPLACE SPANS AT
LEAST THREE GENERATIONS.**



THE URBAN FACTOR

64%

of college-educated millennials choose first where they want to live, and then look for a job.

77%

of Millennials plan to live in US urban cores.

Source: Jeff Speck, Walkable City: How Downtown Can Save America, One Step at a Time, 2012



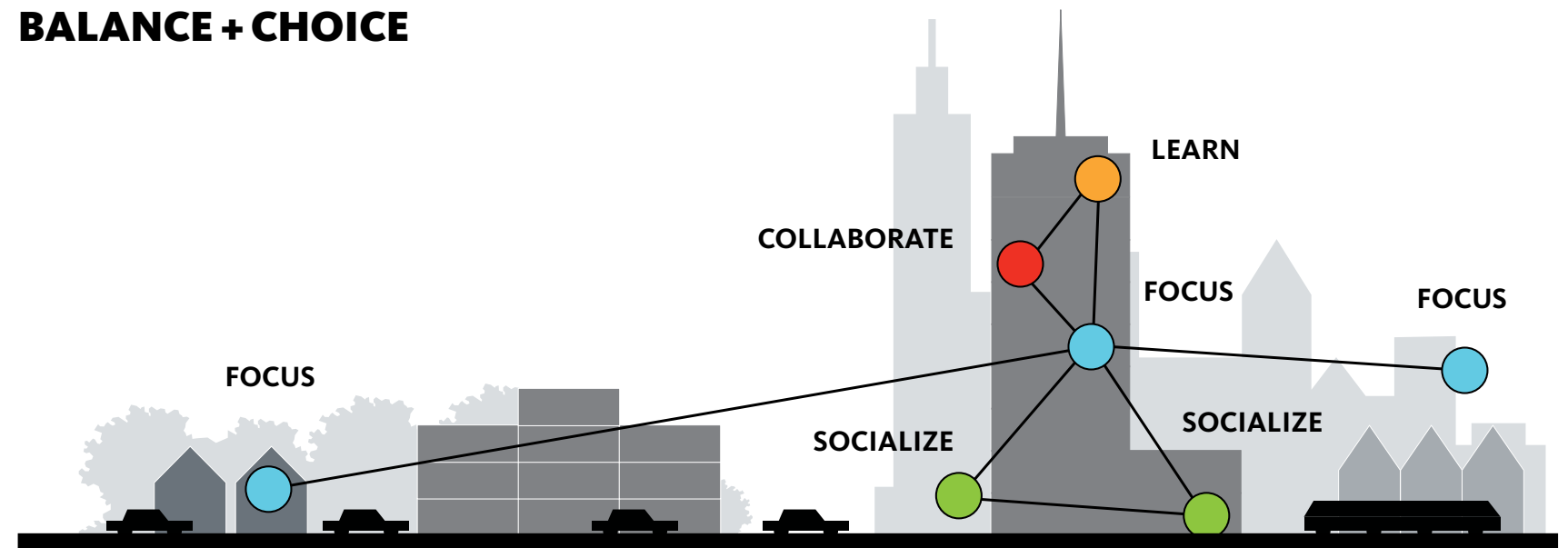
THE HIGH-PERFORMANCE WORK ENVIRONMENT

Offers a variety of work settings that support the **four work modes** and provides both **balance + choice**

THE FOUR WORK MODES



BALANCE + CHOICE



INVESTMENT IN WORKPLACE RESEARCH

The 2013 U.S. Workplace Survey

2,035

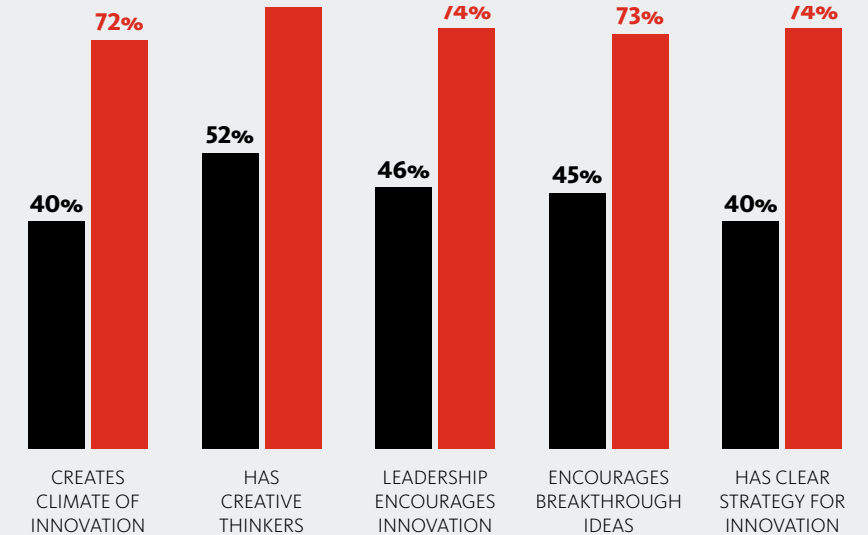
Respondents

10

Industries

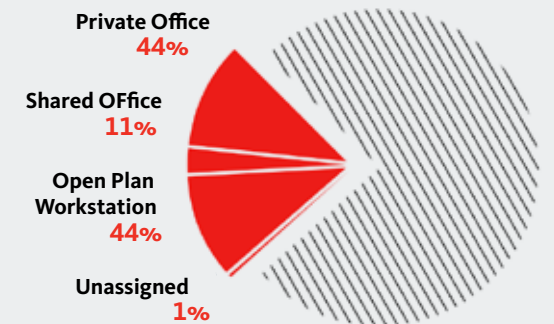


Balanced Workplaces are More Creative, More Innovative



Balance in Any Environment

Workplace balance is possible across work setting types



FEDERAL AGENCIES WORKPLACE TRENDS



FEDERAL TENANT WORKPLACE CHANGE DRIVERS

FREEZE THE FOOTPRINT

- Reduced Cost/SF
- Utilization Rate Assignable
- Support Mobility
- Transit Oriented Development
- Cost/Rent Cap
- Stringent RLP Requirements



GSA HQ 1800 F STREET

PRE-EXISTING

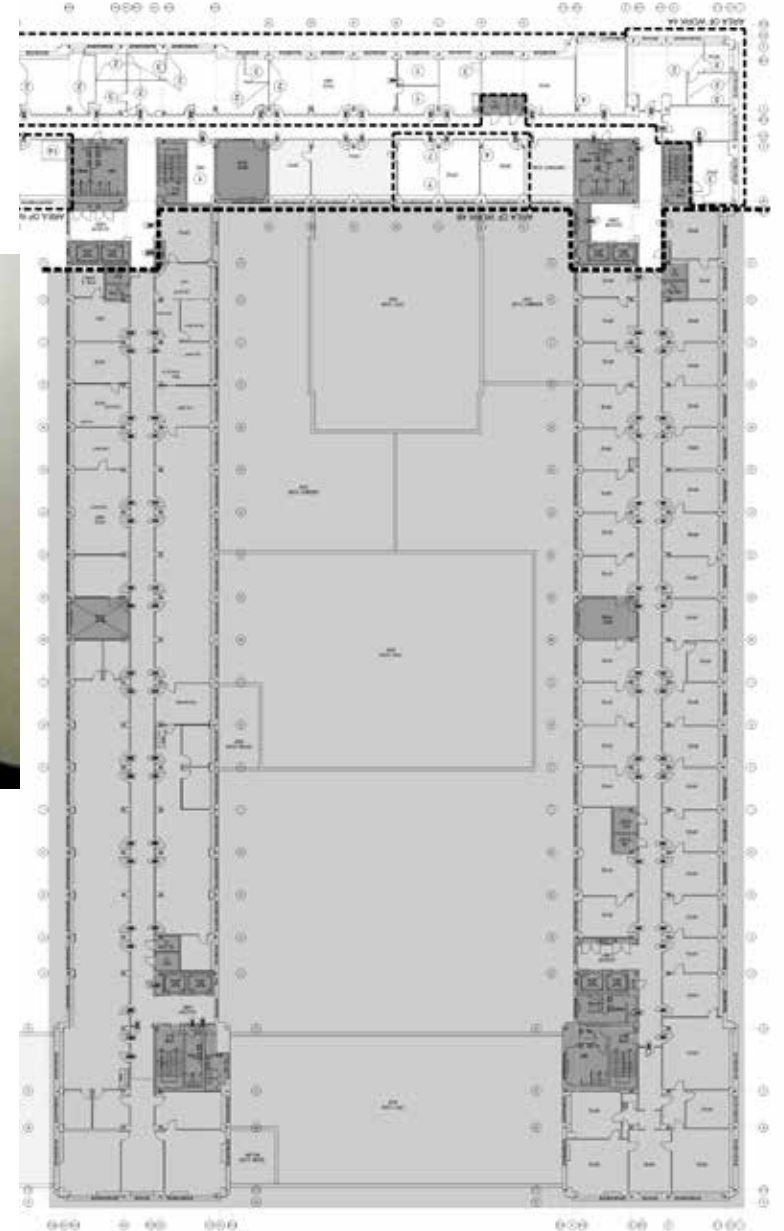
METRICS:

- 4** Workstation Types
- 70** Open Perimeter Offices
- 30** Closed Perimeter Offices
- 1:1** Seating Assignments
(ENTITLEMENTS)

2600 occupants

CULTURAL SHIFTS:

High Panels
Departmental Suites



GSA HQ 1800 F STREET MODERNIZATION

METRICS:

- 4** Workstation Types
- 92** Open Perimeter Offices
- 8** Closed Perimeter Offices
- 1:2** Seat Ratio

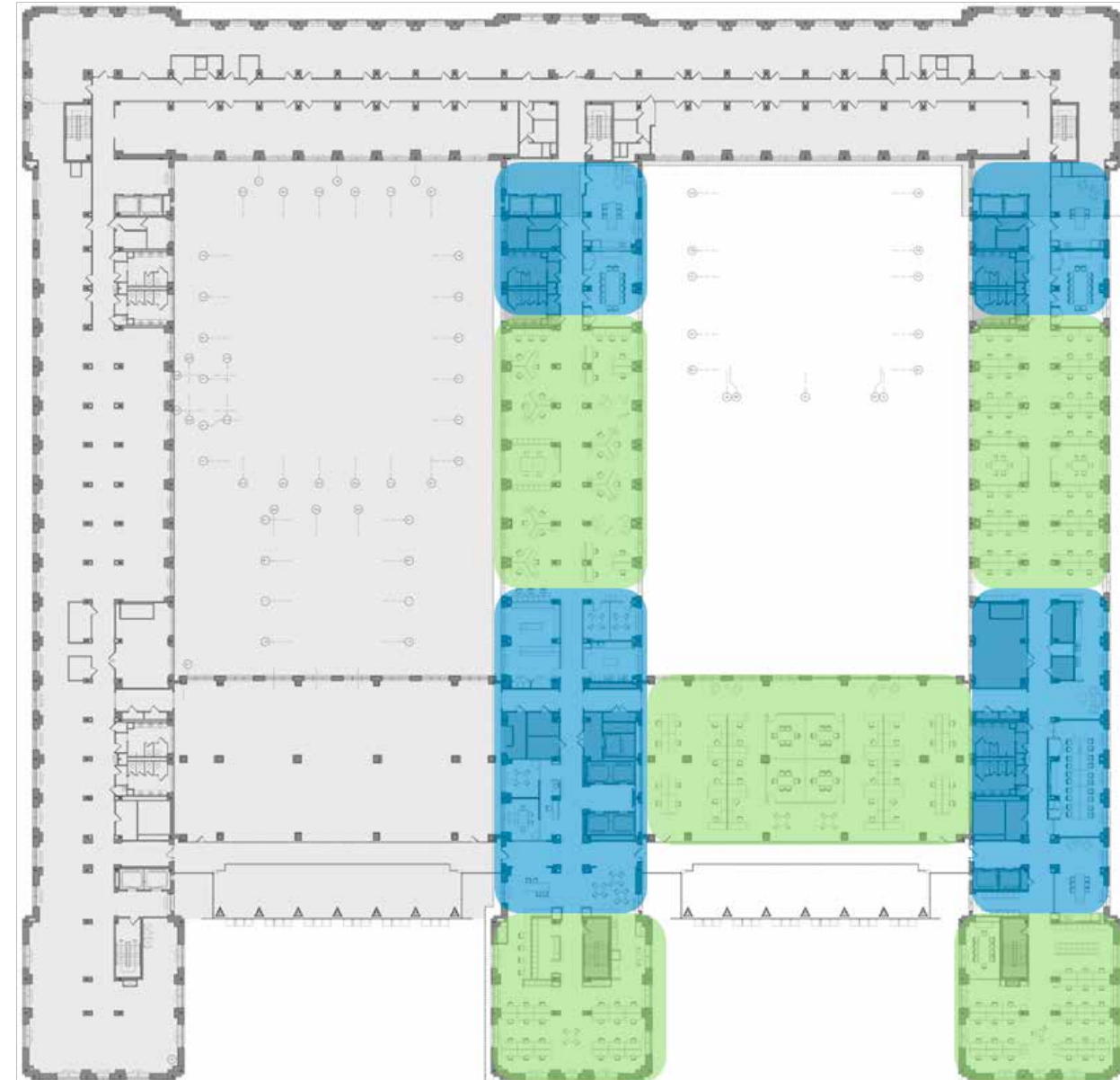
4200 occupants

CULTURAL

No/Low Panels

SHIFTS:

*Neighborhood
Unassigned Seating*



FLEXIBLE

SUPPORT

THE TOTAL WORKPLACE MODEL IN ACTION

GSA HEADQUARTERS, 1800 F ST | WASHINGTON, DC



INCREASED ACCESS TO DAYLIGHT

US DEPT OF HHS HEADQUARTERS | ROCKVILLE, MD



STRINGENT RLP REQUIREMENTS

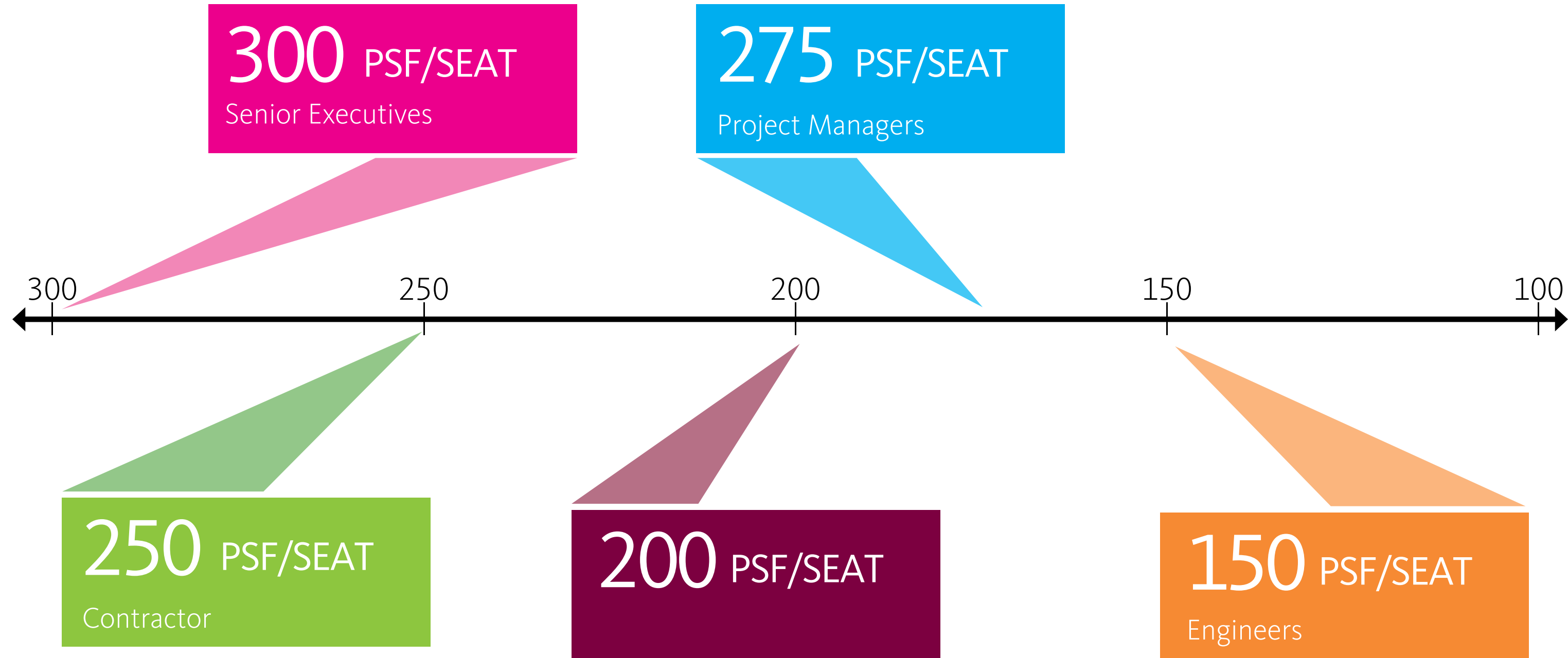


- ✓ Located in the District; Montgomery or Prince George's counties in MD; or Arlington, Fairfax, Loudoun or Prince William counties in VA
- ✓ Property that can accommodate 2.1 million square feet of office and related space
- ✓ Level V security protection
- ✓ Access to Metro and the Beltway.
- ✓ Adequate access to public utilities.

DEFENSE & AEROSPACE WORKPLACE TRENDS



DEFENSE & AEROSPACE INDUSTRY BENCHMARKING



DEFENSE & AEROSPACE WORKPLACE CHANGE DRIVERS

1. Flexible, Secure Environments
2. Renovating Existing Assets
3. Attracting the Right Talent
4. Cyber's Rapid Growth



SECURE BY DESIGN

THE BOEING COMPANY | ARLINGTON, VA



RENOVATING EXISTING ASSETS

LOCKHEED MARTIN ISGS CAMPUS | GAITHERSBURG, MD



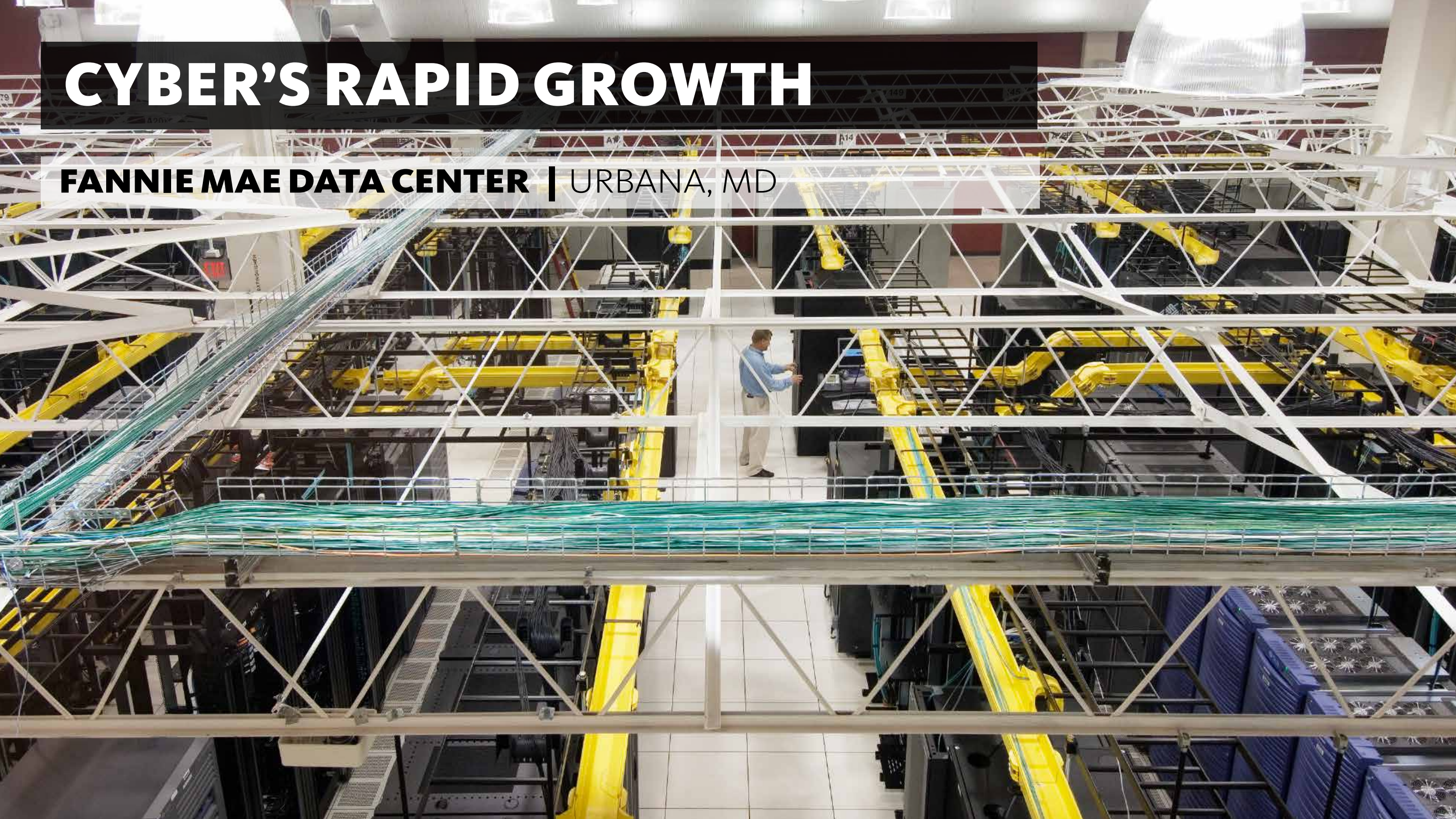
ATTRACTING THE RIGHT TALENT

CONFIDENTIAL DEFENSE CLIENT



CYBER'S RAPID GROWTH

FANNIE MAE DATA CENTER | URBANA, MD

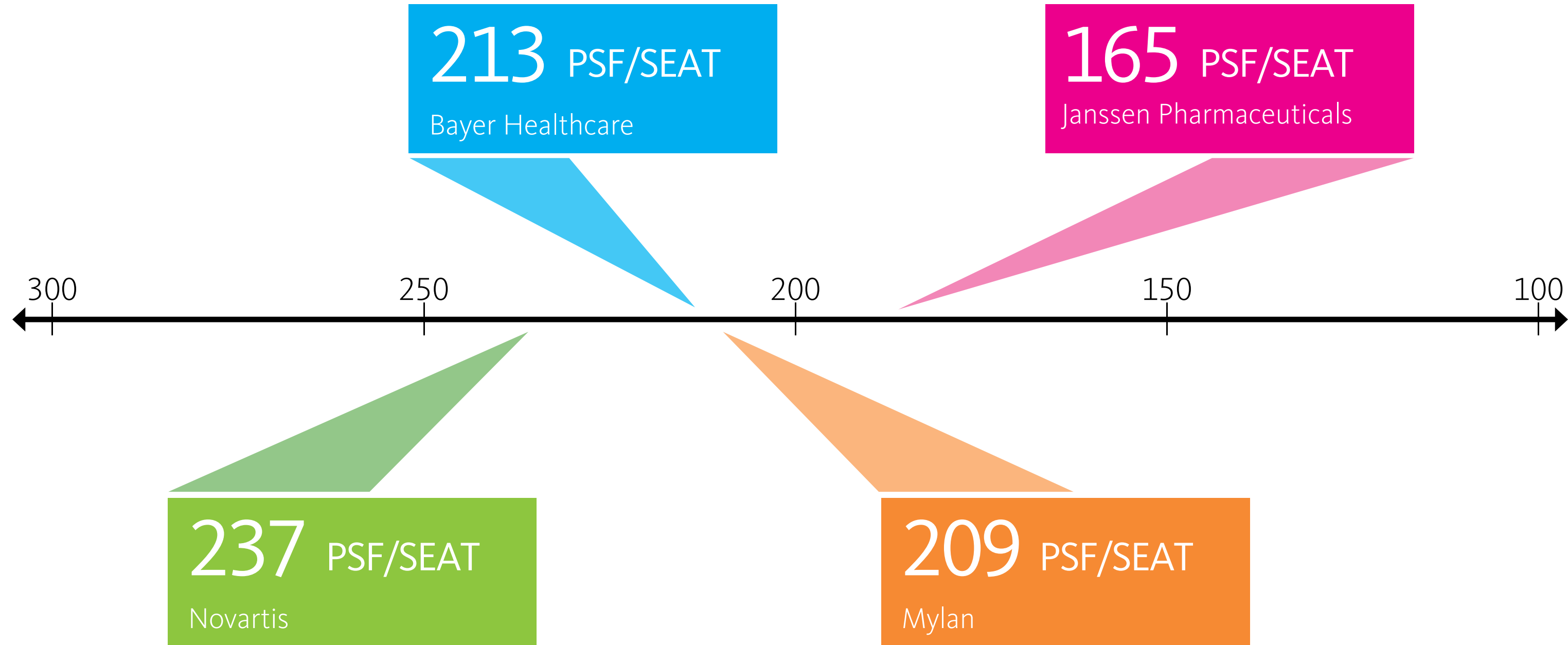


LIFE SCIENCES

WORKPLACE TRENDS



LIFE SCIENCES INDUSTRY BENCHMARKING



LIFE SCIENCES WORKPLACE CHANGE DRIVERS

1. Active Spaces to Promote Health & Wellness
2. Connected to the Mission
3. Bench top to Laptop



LIFE SCIENCES WORKPLACE CHANGE DRIVERS

SHIFTS from :

HIERARCHICAL



OPEN

INDIVIDUAL



COLLABORATIVE

STATIC



ACTIVE

NEUTRAL



BRANDED

FIXED



FLEXIBLE

ACTIVE SPACES TO PROMOTE H&W

BAYER HEALTHCARE | WHIPPANY, NEW JERSEY

PASSAGE TO WELLNESS

30% increase in the number of people who take the stairs.

—Gensler Post-Occupancy



CONNECTED TO THE MISSION

HORIZON BLUE CROSS BLUE SHIELD OF NEW JERSEY | MT LAUREL, NJ



BENCH TOP TO LAPTOP

QUEST DIAGNOSTICS | MARLBORO, MA

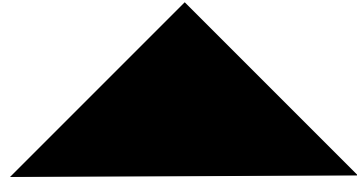


TECHNOLOGY & CREATIVE FIRMS



**MOVE
FAST AND
BREAK
THINGS**

TECHNOLOGY SECTOR IS LEADING JOB GROWTH



20%

of all office-using job growth in the United States over the past five years was in tech sector

50%

of new office construction is in Tech markets

11.6%

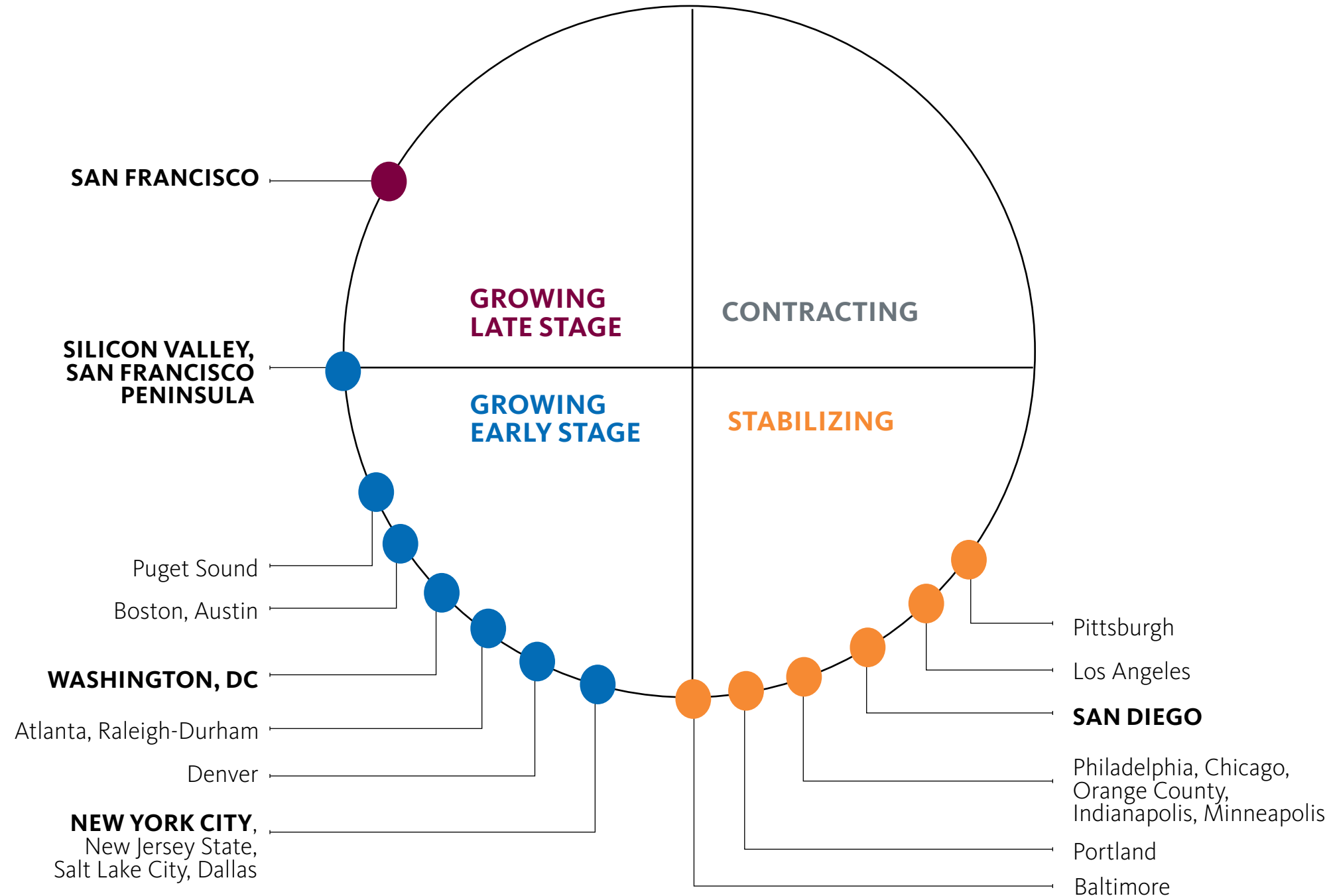
Premium in Tech sector rents over U.S. office market



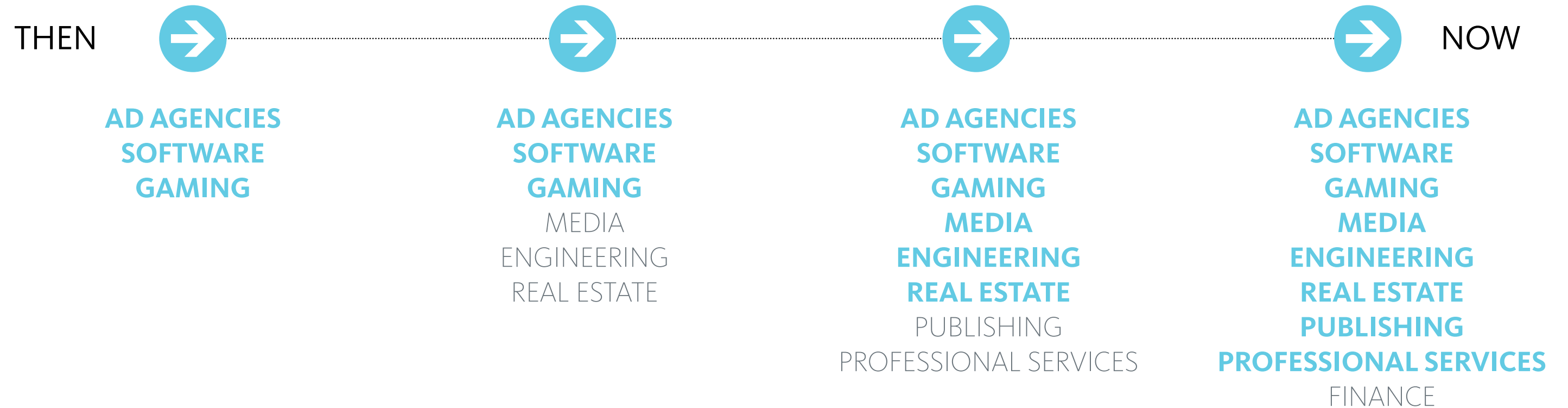
HIGH-TECH INDUSTRY ECONOMIC CYCLE

INDICATORS

- High-tech job growth
- High-tech services concentration
- Intellectual Capital
- Venture Capital Funding
- Innovation
- Tax Credits & Incentives



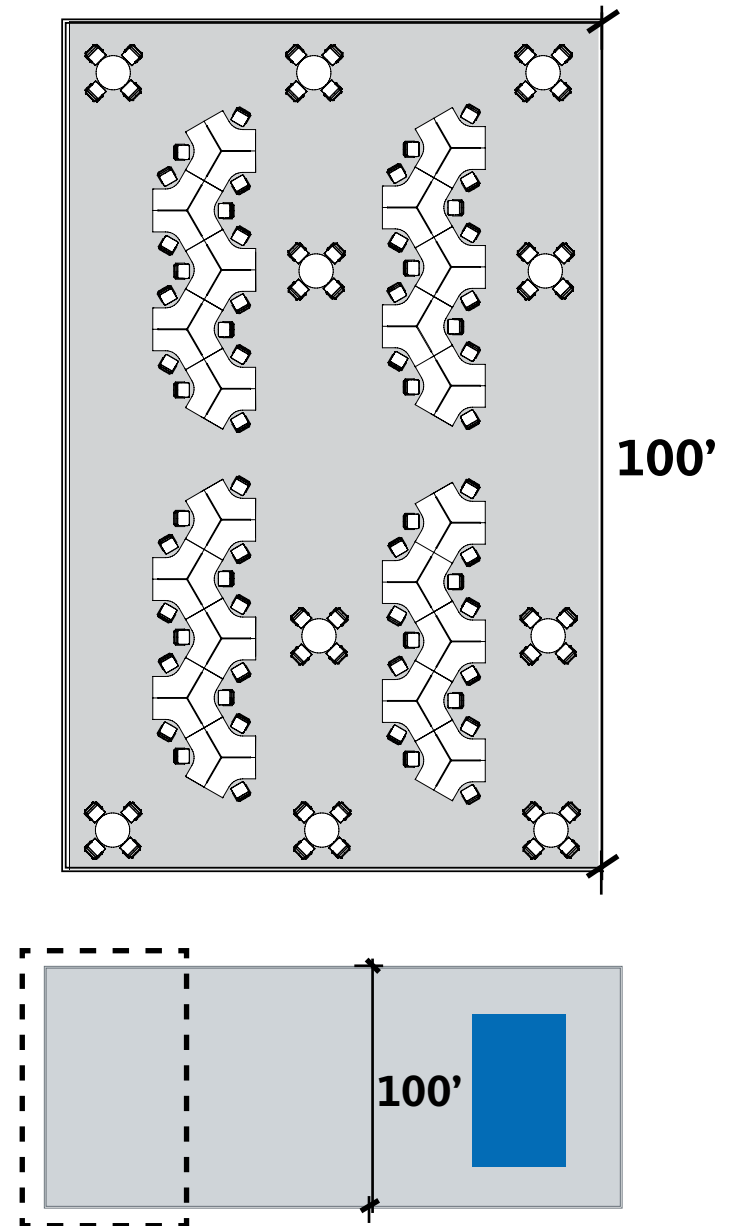
INDUSTRIES SEEKING CREATIVE SPACES



CREATIVE COMPANIES HAVE THE **SAME NEEDS** AS TECH COMPANIES,
AND NOW MORE AND MORE COMPANIES **WANT “CREATIVE” SPACES**

THE IDEAL TECH & CREATIVE FLOORPLATE: IMPACT ON DESIGN

- Offset core
- Contiguous Floor Space
- Volume/raw creative vibe
- User-defined workspaces



LAYOUTS PROMOTING A FLAT HIERARCHY

WIEDEN & KENNEDY | MINNEAPOLIS, MN



COMMUNITY SPACES

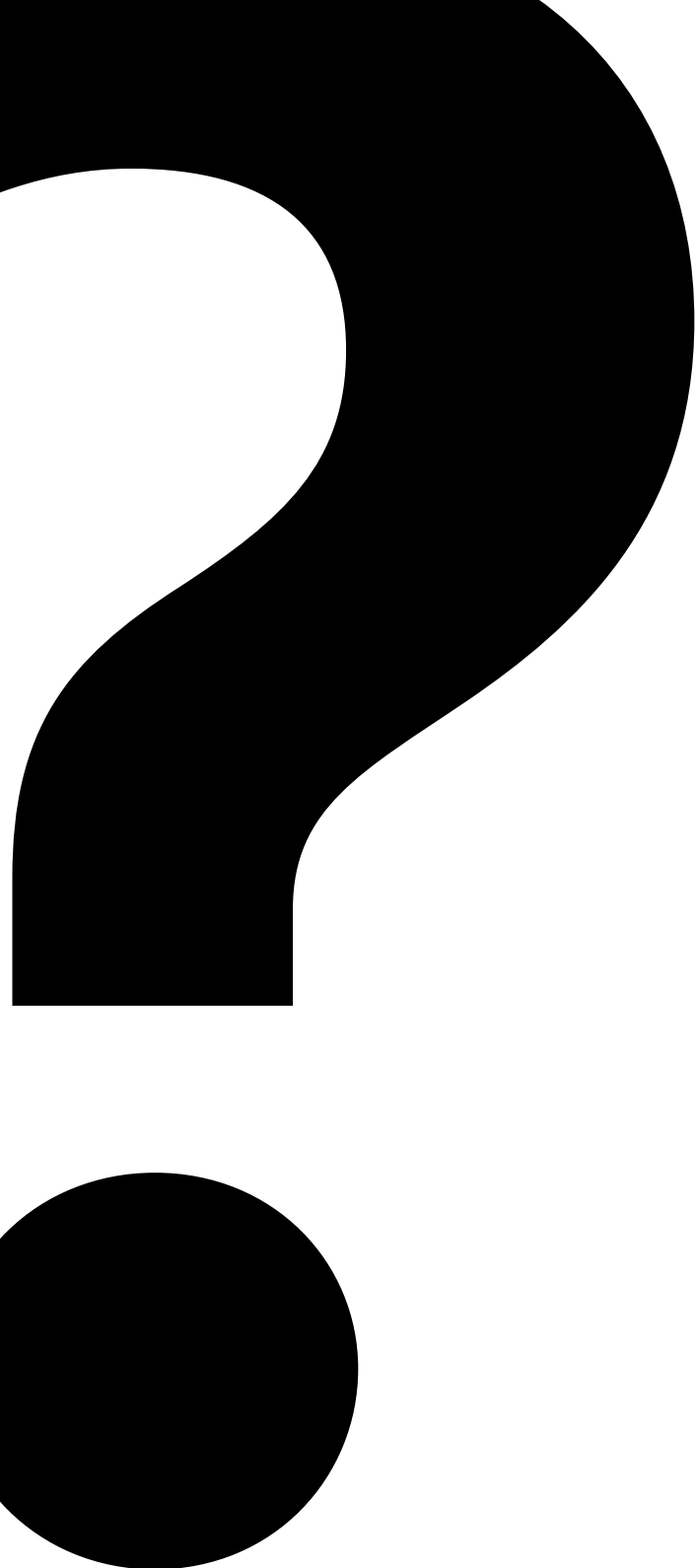
HULU | SANTA MONICA, CA



MOBILITY PROVIDES CHOICE

CONFIDENTIAL TECHNOLOGY COMPANY | MOUNTAIN VIEW, CA





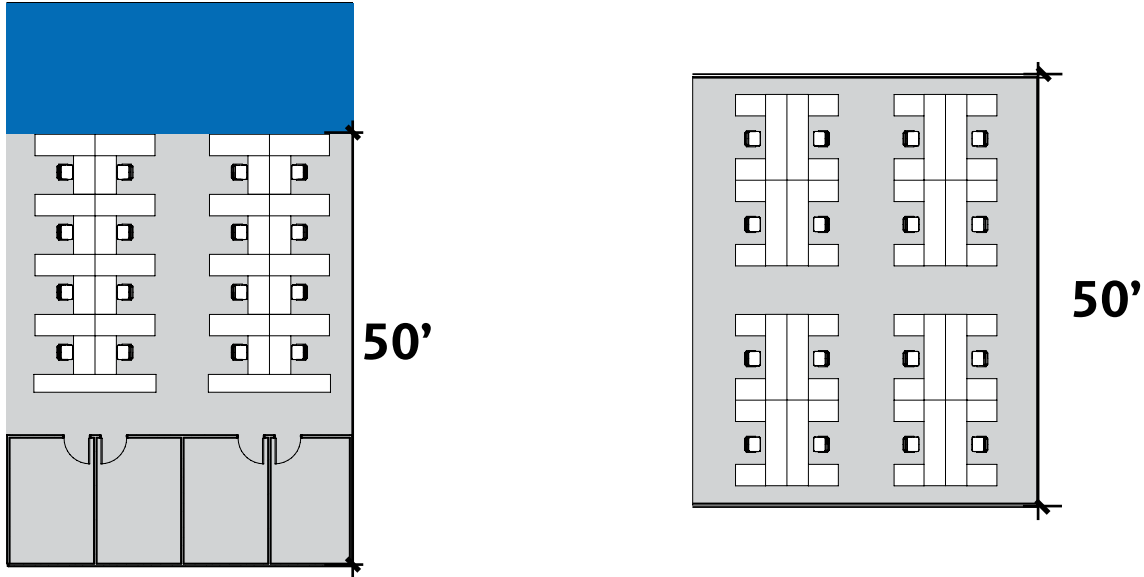
HOW DOES THE NEW
WORKPLACE IMPACT **THE**
OFFICE BUILDING OF THE
FUTURE

New Paradigm in Office Buildings

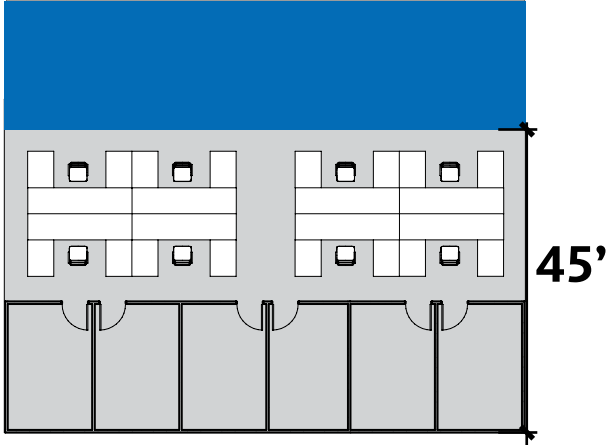
	Pre-Recession	Post-Recession
Floor Plate	20 - 25K	25 - 60K
Ceiling Heights	8' - 9' Typical Same height throughout space	9' - 12' Typical Varying heights based on use
SF/Person	250 - 350 SF/person Pancake office plates 10% Chance of running into someone	150 - 250 SF/person 2 - 3 Story opening interconnecting stairs more common Interconnected floors that promote serendipitous interaction
Amenities	Dispersed	Density of amenities - urban (walkable)
Location	Cbd/suburban	Networking district or "neighborhoods"

One Size Does Not Fit All

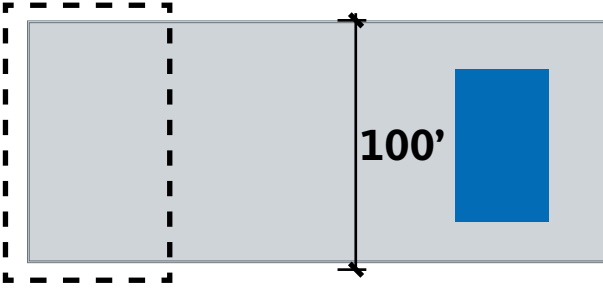
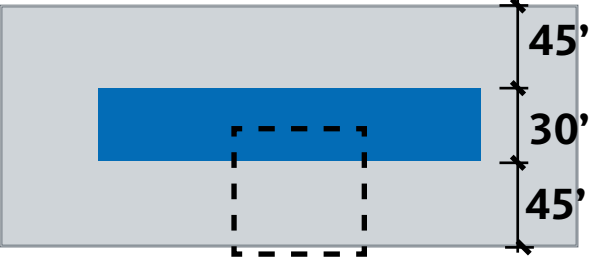
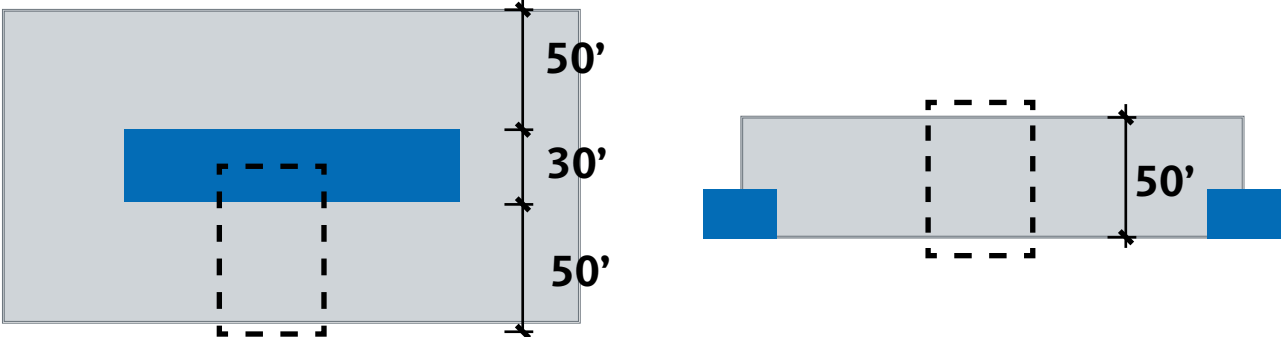
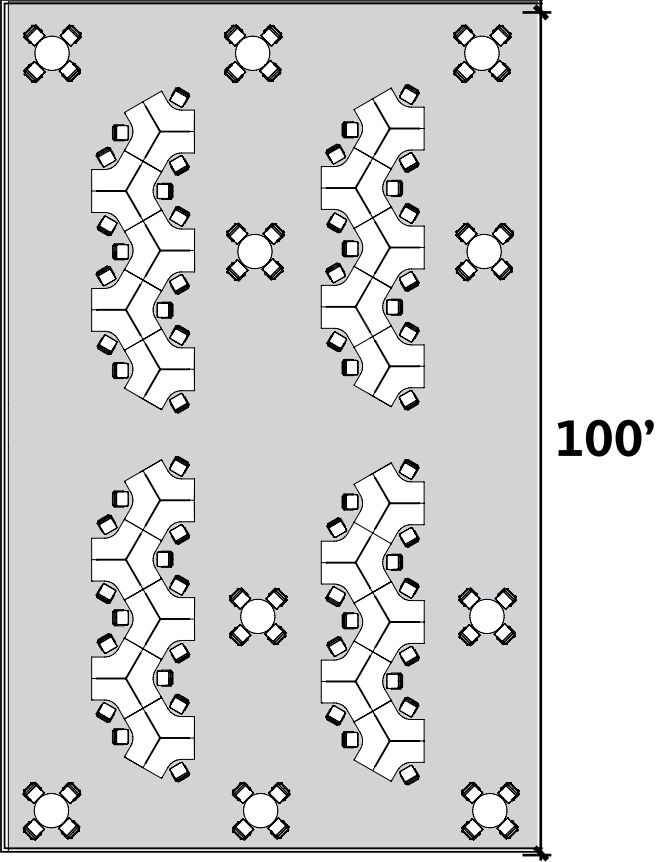
GOVERNMENT



LEGACY CORPORATE



TECH & CREATIVE FIRMS



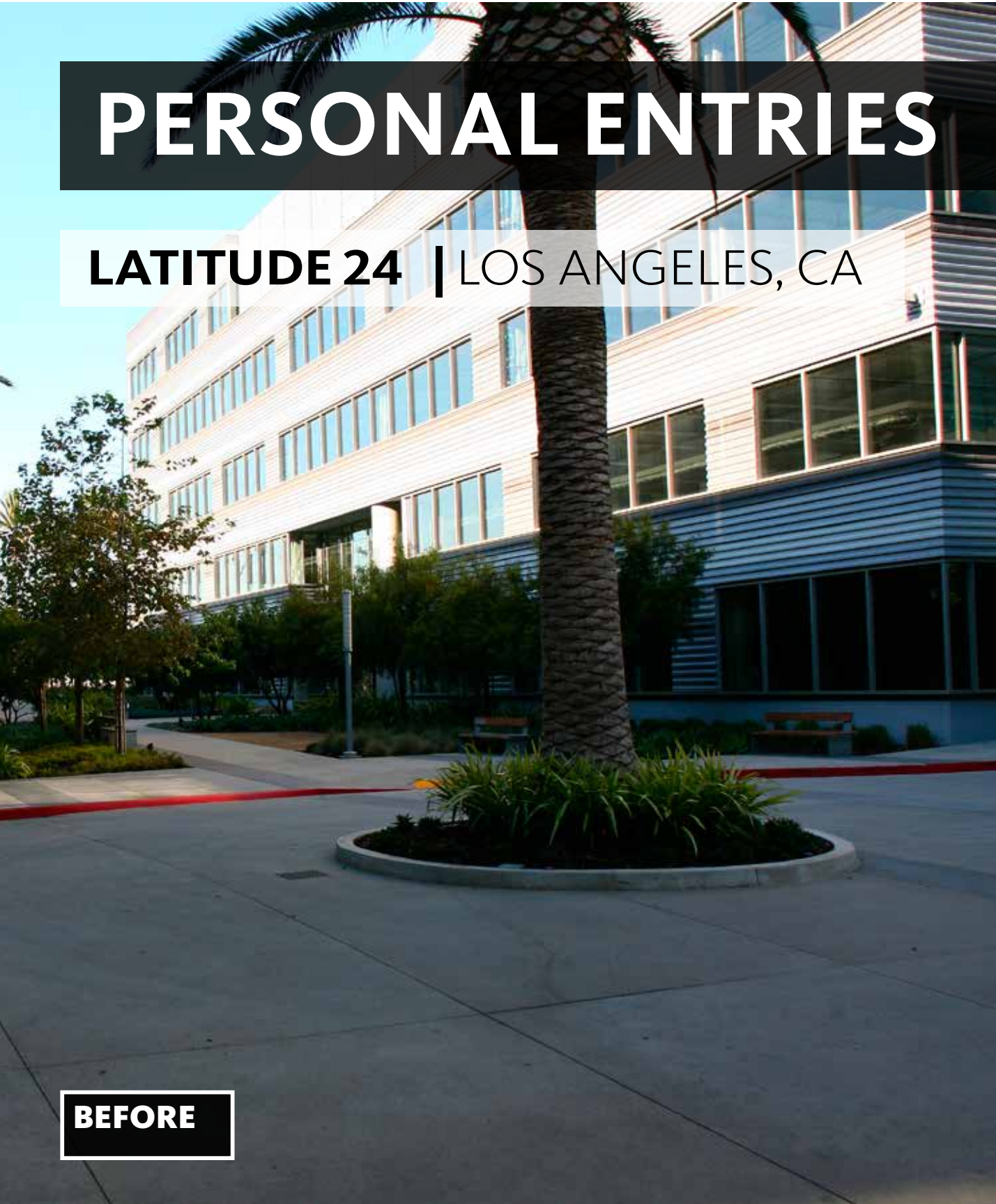
CREATING AN IDENTITY

EDENS HEADQUARTERS | COLUMBIA, SC



PERSONAL ENTRIES

LATITUDE 24 | LOS ANGELES, CA



BEFORE



SENSE OF HEALTH

BELKIN HEADQUARTERS | LOS ANGELES, CA



NEW LIFE IN OLD STRUCTURES

888 BRANNAN | SAN FRANCISCO, CA



BEFORE



HACKABLE BUILDINGS

FBI HOOVER BUILDING | WASHINGTON, DC



BEFORE

HACKABLE BUILDINGS

FBI HOOVER BUILDING | WASHINGTON, DC

