COUNTY OF SAN MATEO
Inter-Departmental Correspondence
Department of Public Works

DATE:	September 30, 2010
BOARD MEETING DATE:	October 19, 2010
SPECIAL NOTICE/HEARING:	None
VOTE REQUIRED:	Majority

TO: Honorable Board of Supervisors

FROM: James C. Porter, Director of Public Works

SUBJECT: Recommended Work Place Standards and Principles for San Mateo County

RECOMMENDATION:
Adopt a Resolution:

1.   Approving office standards for future County-wide projects involving space allocation and reallocation; and

2.   Appointing three Board of Supervisors Subcommittees, one each to provide input on the master plan for the future of the Redwood City, San Mateo and Tower Road County campuses.

BACKGROUND:
On August 25, 2009, the Board of Supervisors adopted Resolution No. 070359, which commissioned Architect Hellmuth, Obata and Kassabaum, Inc. (HOK) to provide Countywide space utilization and master planning services under contract to the Department of Public Works.

DISCUSSION:
The County Master Plan Steering Committee, which includes representatives from the County Manager's Office, Department of Public Works, Health and Hospitals, and Real Property, has been working with HOK to determine the most effective use of County-owned and leased facilities, as well as provide a strategic plan for future use of County facilities and real property.

A key first step in developing the strategic plan is to adopt the space standards recommended by HOK. In the past, County departments have not applied County-adopted space standards when doing interior layouts for their facilities. Today, the average square footage per employee in departments varies from under 200 sq. ft. per person to over 700 sq. ft. Thus, implementation of consistent standards and

consolidation and sharing of common areas and meeting rooms will improve facility utilization and potentially reduce department operating costs. The recommended space standards are included in Attachment A. Attachment B provides a narrative on best practices for space planning and provides a basis for the recommended space standards.

These guidelines reflect current "state of the practice" in space planning and present an overview of the office planning process. Since imposition of space standards is a new concept for many departments, the guidelines include the supporting principles and concepts behind the standards.

With regard to the Facilities Master Plan, HOK is developing site-planning options for the three (3) major County-owned campuses in Redwood City, San Mateo, and the Tower Road area. To evaluate the HOK options and offer additional insights, staff recommends that the Board of Supervisors appoint three (3) ad-hoc subcommittees of two (2) supervisors each to provide input into the master planning process. One option for the committees is to have one (1) Supervisor participate on all three (3) committees for the sake of consistency and be joined by the Supervisor representing the district where the campus is located. It is requested that your Board support this recommendation and provide input on the membership of these subcommittees.

On September 15, 2010, the Finance & Operations Committee approved the said standards and principles. County Counsel has reviewed and approved the Resolution as to form.

Approval of this Resolution contributes to the Shared Vision 2025 outcome of an Environmentally Conscious Community by improving the utilization of existing real estate assets through consolidation and modernization over time.

FISCAL IMPACT:
There is no impact to the General Fund.

Attachments: A – San Mateo County Facility Master Plan Report Recommended Workspace Standards
              B – San Mateo County Workplace Recommended Standards and Principles

Recommended Workspace Standards

Workplace Standards	Proposed for San Mateo County	
Top Executive (County Manager)	300	E
Senior Management (Director/ Deputy Director) **Board of Supervisors** **Intermediate Management**	200-225	E
Management	120-150	E
Supervisory Staff **Professional / Technical Staff**	100-120	O
Typical Staff **Single task clerical**	64	O
Field Staff	48	O
E: Enclosed; O: Open		

Work Place Recommended Standards and Principles

Wide Variation in Existing Workspace

The County's facilities lack consistency in the size and allocation of space due to wide variety of factors. Issues include:

- No formal guidelines for the allocation of workspace

- County buildings vary greatly in age and quality of workspace.

- Multiple types of systems furniture.

- Spaces are disjointed and compartmentalized.

This creates a number of problems for the County, including:

- Inefficient and ineffective use of space.

- Inconsistent use of space from department to department, floor to floor, and building to building.

- Inequitably assigned space between departments and job functions (same job function is given different amount/quality of workspace).

- High cost associated with moves, maintenance and reconfigurations.

- Lack of flexibility.

- No common "look and feel" for County space.

Just as inconsistencies in individual workspaces have emerged over time, there is also wide variation in the allocation of support spaces, such as meeting rooms, break-rooms and storage rooms. Because departments have grown organically over time, there are significant differences in the size and amount of support spaces throughout the County's portfolio. Challenges caused by the inconsistency in support space allocation include:

- The size, location, and features of meeting spaces differ from floor to floor and building to building.

- Typically, spaces are not shared between departments, causing unnecessary duplication of support, such as reception and break-rooms.

- No consistency in document management.

- In some locations, a lack of growth space has led to using support areas for staff, leaving a deficiency for the original purpose (e.g. conference, break, etc).

Best Practices for Space Planning

To better understand how the County can maximize the usefulness of its current facilities and plan new spaces that fit the demands of the users and the public, benchmark data was compiled from both private and public organizations. "Best practice" concepts, planning principles, and trends include:

- Fewer workplace standards using a set of common dimensions.

- Flexibility within standard modules to accommodate different configurations.

- Mobile and stackable furnishings that can accommodate a variety of uses.

- Centralized management of conference and training rooms.

- Support space allocation based on usage.

- Most support spaces not "owned" by department but shared by overall floor population.

- Fewer hard walls to enable flexibility.

- Offices on interior rather than exterior window walls, to allow for greater access to natural light to the open office.

- A document management policy that promotes electronic storage.

- Future facilities planned to ensure that the standards can be efficiently and flexibly deployed and managed over time.

The adoption of these best practices can help the County:

- Decrease overall space requirements

- Increase the flexibility to change while decreasing the cost of doing so

- Implement a set of design and planning guidelines.

- Maximize the usefulness of existing facilities.

- Equitably assign space between buildings and departments.

- Set the standards and guidelines for planning new spaces.

- Provide a more effective environment to support county work

The chart on page 7 compares the workspace standards of a number of public sector peers in order to form a basis for recommended standards for San Mateo County.

## Best Practices – Flexibility

Over the last two decades it has been well demonstrated that there are significant benefits and savings to be captured by designing buildings and interior spaces that are highly flexible. By creating spaces that are easily reconfigured organizations gain the ability to change the assignment and use of space quickly with minimal costs.

A critical component in maximizing the flexibility within a building is to try to design space using common, repeated dimension or "modules". This "modularity" within a building allows for a single space to be reconfigured into a number of functions. Both individual workspaces and shared support spaces benefit from being planned on a common module. For example, two sizes of workstations can be planned using dimensions that allow for one large workstation to be reconfigured into two small workstations or vice versa. The same concept applies to hard walled spaces such as offices and conference rooms. In many instances a private office, conference room, and file room can be planned using the same dimensions, therefore becoming convertible from one to another function. If demand for one particular type of spaces increases or decreases over time, it becomes very easy to change the use of that space from one function to another. Applying these principles of modularity to a space yields a "kit of parts".

Multiple Spaces Planned Using Common Dimensions

Private Office	Enclave Conf.	Conference	Team Area – Meeting / Conf.	Shared Touch-Down	Tech Support	Project Work Room	

Flexible Enclosed Work/Support Zone

*Circulation*

Flexible Open Work Zone
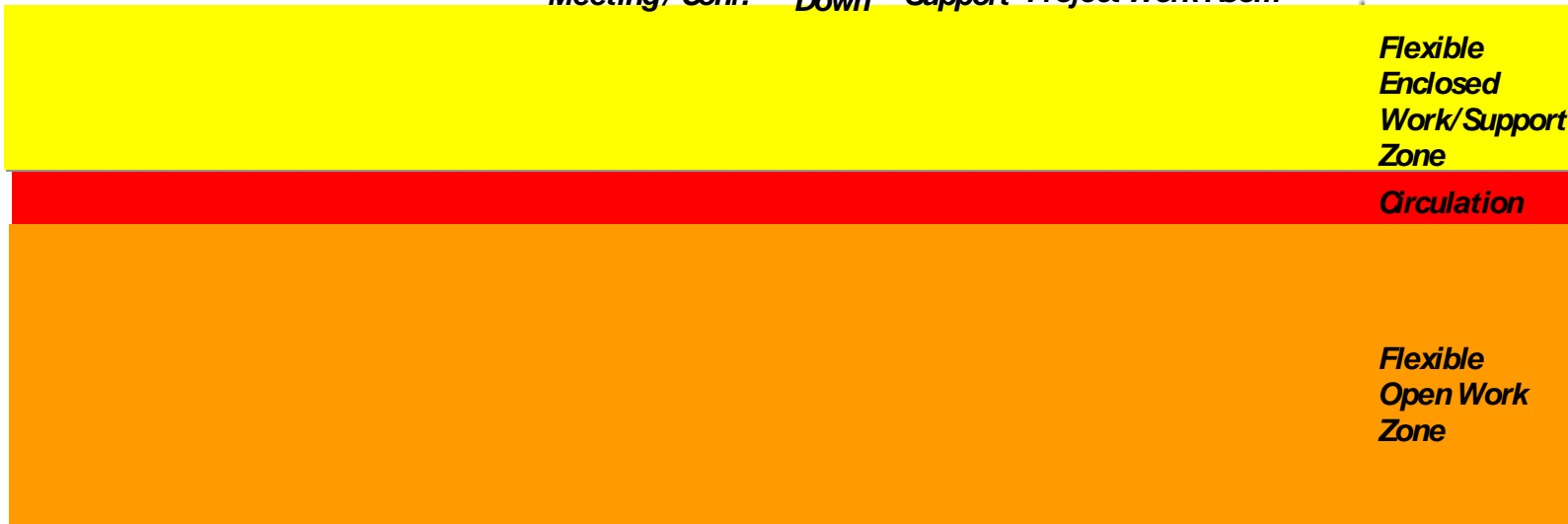
Best Practices – Open Planning

There has been a trend in the corporate sector towards a predominantly open plan with a minimum number of enclosed offices.   While the public sector has typically maintained a higher ratio of enclosed offices, the benefits of the open plan are being realized and many public organizations reducing the proportion of private, hard walled offices. The benefits that can be realized include:

- Increased flexibility

- Access to natural light for the majority of staff

- More efficient layouts requiring less space

- Lower cost of reconfiguration

- Increased communication between individuals, teams, and departments

While there are obstacles for an organization to overcome in implementing this type of change, a well defined and executed change management plan can help to successfully transition staff into a new work environment.

Traditional "Enclosed" Office Plan (75% enclosed offices)
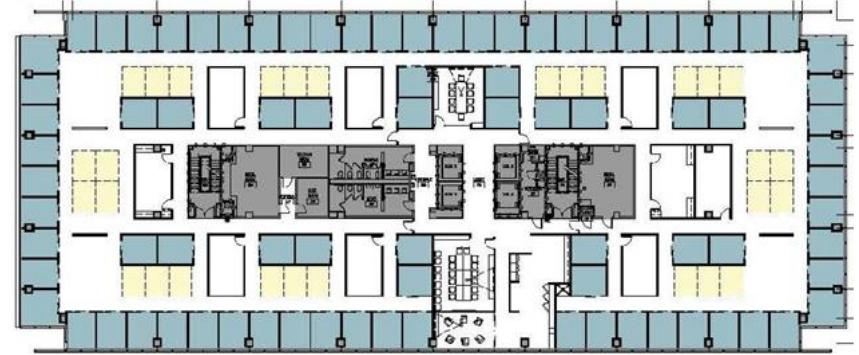
**"Open" Office Plan (15% Private Offices)**
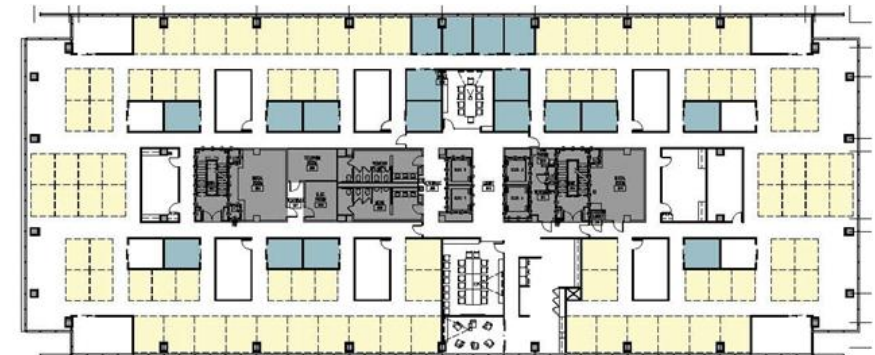
Best Practices – Access to Natural Light

The benefits of natural light have been well documented in recent years and corporations and organizations are making major strides in providing environments that maximize the access to natural light.

Access to natural light can be inhibited by many factors including:

- Older buildings not designed for modern planning.

- Office layouts that have a high ratio of enclosed offices located on the exterior window wall.

- Utilization of high paneled "walled" workstations.

- Buildings with a long distance from core to window.
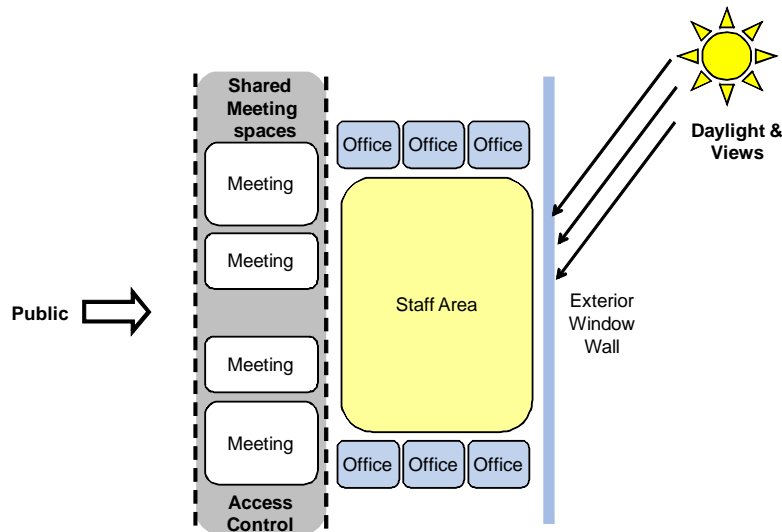
Natural light can be maximized by implementing planning principles such as:

- Planning private offices off the exterior window wall with glass fronts or sidelights.

- Reducing the number of private offices.

- Using low paneled "walled" workstations.

- Planning support spaces off the exterior window wall.

Best Practices – Support Spaces

In conjunction with the implementation of a set of space standards and space assignment policies, there are additional best practices that could help the County create a highly effective work environment.

- Centralized management of conference and training rooms.
- Support space allocation based on usage and population.
- Greater proportion of support not "owned" by department but located and configured to be shared by overall floor population.
- Fewer hard walls, to enable flexibility.
- Rooms furnished with mobile and stackable furnishing that can accommodate a variety of uses.
- A document management policy that promotes electronic records access, limits on-site storage, and requires regular purging of paper files.

To maximize their usefulness, support spaces should be planned as shared spaces that can be modified over time, as the needs of the users change. These planning guidelines are based on departmental questionnaire responses, departmental interviews and best practices.
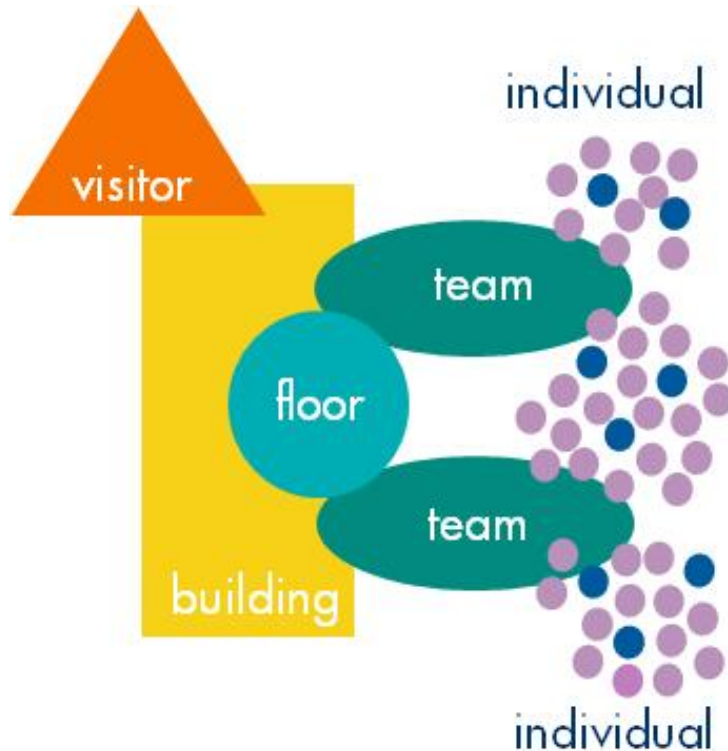
Best Practices – Individual Workspaces

The attached Recommended Workplace Standards propose that the County begin to standardize on fewer workstation sizes. Two private office sizes, a hybrid open/enclosed workspace, and a universal open workstation can accommodate almost all typical County needs.

While the County will not immediately retrofit all spaces to comply with standards, the implementation of standards should be done as new space is acquired or existing space is renovated.

- Two office sizes are proposed, one larger standard for executive/senior management, and one medium sized standard for general management.

- Supervisors and high level professional staff can be housed in either private offices or workstations, depending on the degree of confidentiality their job requires. Supervisor level offices are typically smaller than management offices. Workstations have a taller panel height to increase acoustic privacy and typically include an accommodation for guest seating.

Two sizes of open workstations should be planned on a module that allows for ease of conversion from one to another. For example, a larger sized, open workspace can accommodate staff in a supervisory role, those with a higher degree of privacy requirements, or those who require more document/paper layout space. A smaller sized station is utilized for the majority of staff and is planned to enable multiple configurations.

Currently San Mateo County has no Workspace Standards

WORKSPACE STANDARDS COMPARISON
(square feet per person) — E: Enclosed; O: Open

	Existing Standards Study in San Mateo County													
	COB 2 (Child Support, Floor 2)		COB 2 (Assessor, Floor 3)		COB 2 (Controller, Floor 4)		COB 1 (Planning & Building, Floor 2)		HSA (1 Davis Drive, Floor 1)		HSA (Harbor Bldg. A)		HSA (92nd Daly City, Floor 1)	
Top Executive (County Manager)	240 (1)	E	300 (1)	E					300 (1)	E				
Senior Management (Director/ Deputy Director)	200 (7)	E	200 (1)	E	320 (1)	E	200 (1)	E	200-250 (10)	E	250 (1)	E	180 (1)	E
Board of Supervisors									180 (2)	E	200-220 (2)	E		
Intermediate Management	150 (1)	E	150-180 (13)	E	140 (3)	E	144 (5)	O	120-150 (20)	E			150 (5)	E
Management														
Supervisory Staff	120 (6)	E	120 (5)	E	100 (3)	E	100-120 (8)	O	100 (6)	E	160 (3)	E		
Professional / Technical Staff	100 (1)	E	100 (46)	O	80-100 (10)	O	80-96 (29)	O	120 (17)	O	100 (4)	E		
Typical Staff	120 (2)	O	80 (54)	O	64 (13)	O	48 (18)	O	80 (8)	O	100 (25)	O	80 (31)	O
	80 (7)	O									80 (20)	O		
Single task clerical	64 (1)	O			48 (20)	O			64 (44)	O	64 (31)	O	48 (2)	O
	48 (66)	O			24 (3)	O					48 (2)	O		
Field Staff														

Benchmarks for Workspace Standards

	Case Studies and Best Practices																	Proposed for San Mateo County	
	State of California		San Jose City Hall		Bellevue		Santa Monica		Clark County		Phoenix		City of San Francisco		SFIA					
Top Executive (County Manager)	300	E	300	E	300	E			280-400	E	300	E	400-480	E	350-400	E			300	E
Senior Management (Director/ Deputy Director)	200	E	225	E	200	E	250	E	200-240	E	225	E	185-225	E	225-300	E			200-225	E
Board of Supervisors	112-150	E																		
Intermediate Management			150	E	120	E	150	E	140-200	E			135-175	E					120-150	E
Management											150	E								
Supervisory Staff	80-110	O	120	E	108	O	100	E	100-120	E			75-110	E/O	100-120	E			100-120	O
Professional / Technical Staff			100	O	72	O	64	O	80-120	O	100	O			65-70	O				
Typical Staff	64-75	O	64	O	49	O	48	O			65-100	O	35-60	O	48-56	O			64	O
Single task clerical	40-64	O							48-70	O	60	O							48	O
Field Staff																				

E: Enclosed; O: Open

Workplace Standards Recommendations

Office Types

Private Office (300 SF)

This is the largest work space, appropriate for the County Manager and Board appointees whose functions require additional space.
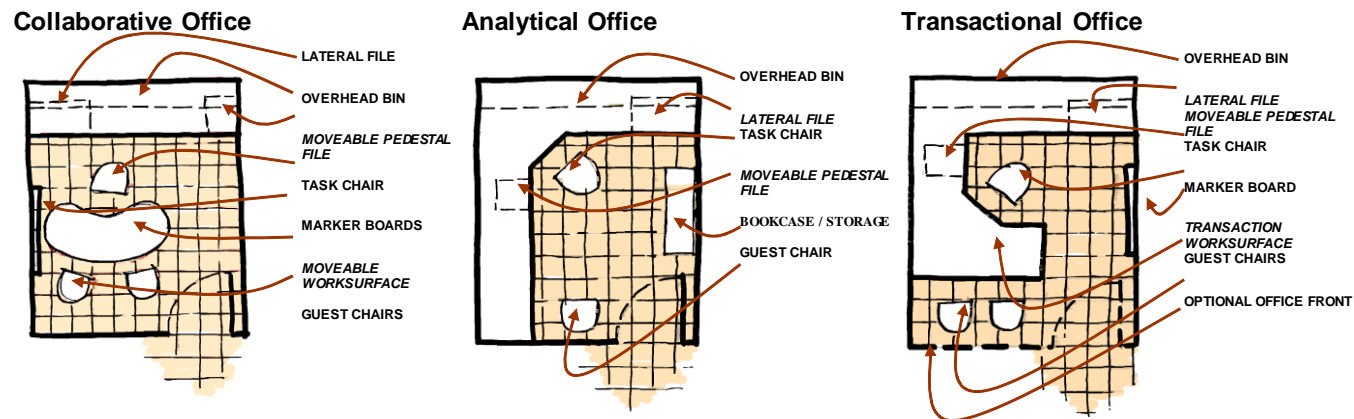
Private Office (225 SF)

Intended for Department Heads, Assistants to Department Heads, some Deputies and Board members, these offices will have all the same amenities as the 120 SF private office, and may also have a small conference table.

Private Office (150 SF)

Intended for Division Heads and Deputy Directors, these offices will have all the same amenities as the 120 SF private office. The additional area can be used for more comfortable accommodations for guests or to house additional files.

Private Office (120 SF)

Intended as the typical office, this standard would be allocated to managers, attorneys, and staff who have a significant and continuous need for confidential communications with others. Requirements for a private office include work surfaces, overhead storage bin, fixed and/or moveable pedestal file, lateral files, task chair, and (2) guest chairs.

Collaborative Office

LATERAL FILE
OVERHEAD BIN
MOVEABLE PEDESTAL FILE
TASK CHAIR
MARKER BOARDS
MOVEABLE WORKSURFACE
GUEST CHAIRS

Analytical Office

OVERHEAD BIN
LATERAL FILE
TASK CHAIR
MOVEABLE PEDESTAL FILE
BOOKCASE / STORAGE
GUEST CHAIR

Transactional Office

OVERHEAD BIN
LATERAL FILE
MOVEABLE PEDESTAL FILE
TASK CHAIR
MARKER BOARD
TRANSACTION WORKSURFACE
GUEST CHAIRS
OPTIONAL OFFICE FRONT

ADVANCE *strategies*

Workplace Standards Recommendations, cont'd
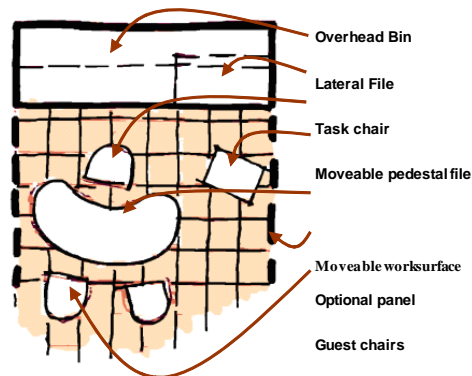
Workstation Types

Open Office Workstation, Typical (64 SF)
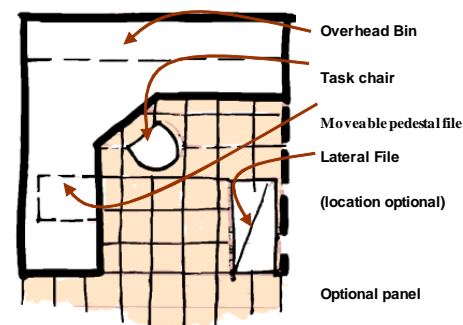This is the most common semi-private open standard , intended to house the majority of County staff.
• Proposed size is 8 x 8; the majority of office work functions can be accomplished in this size work space.
• Minimum requirements include a work surface, fixed and/or moveable pedestal file, (2) high lateral file cabinet under work surface, task chair, overhead storage bin and paper management accessories.

In addition to the 8x8 standard, some staff have unusual requirements to satisfy their work function. Some of the equipment that must be accommodated in these types workstations are layout of large drawings, (4) high lateral files, printers, scanners, other graphic equipment, odd sized files, etc.
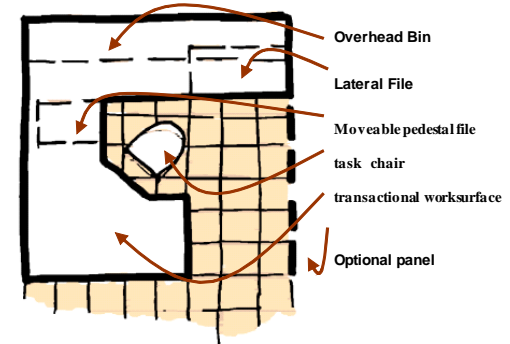
Collaborative Workstation

- Overhead Bin
- Lateral File
- Task chair
- Moveable pedestal file
- Moveable worksurface
- Optional panel
- Guest chairs

Analytical Workstation

- Overhead Bin
- Task chair
- Moveable pedestal file
- Lateral File
- (location optional)
- Optional panel

Transactional Workstation

- Overhead Bin
- Lateral File
- Moveable pedestal file
- task chair
- transactional worksurface
- Optional panel

Workplace Standards Recommendations, cont'd

The following is a description of several functions that may need non-typical workstations and equipment/furniture.

Open Office Workstation, Exceptional Needs (80 SF)
Client-Oriented – Some staff have a special need that requires 1-2 guest chairs since they must work with visitors on a daily basis. No other special requirements are necessary.
Architects, Engineers, Project Managers, and Graphic Designers (Several Departments) – These staff types sometimes need a larger work area to accommodate a deeper than standard work surface to support review of oversize drawings, overhead storage bin, and moveable pedestal file.

Workstation Types– Unassigned and Field Staff
Touchdown Space (40 SF)
These spaces are not assigned and are used on an as needed basis by telecommuting staff or visitors.
• This space should contain a work surface, task chair, moveable pedestal file, overhead storage shelf and paper management accessories.
• It is important to exclude any type of anchored storage that would imply personal ownership of the station.

Inspector/Courier (10-15 SF allocation)
This category of work space is seen as a group setting for staff who do a majority of their work in the field, and so have few requirements when in the office. Shared common files may be located adjacent to the work area.
• This space should contain a work surface and task chair with some shelving provided for temporary use.
• Some inspectors will also need moveable pedestal files (handle on an as needed basis).