Open Plan Workspace Governance Task Force
Final Report

April 2016

Please note that the following actions were taken on this report.

1) On April 20, 2016, the UCSF Space Committee (previously the UCSF Space Development Committee) accepted the Task Force report principles for open plan design in future new buildings. It requested that the principles in the report be shared with the chairs and directors of departments/programs who will occupy the future buildings during the programming phase of such buildings.

   The Committee also accepted the Task Force report recommendations to:
   - Establish a governance structure and communication program for Mission Hall
   - Create a Mission Hall Rapid Improvement Fund

   Proposed investments in Mission Hall beyond the Rapid Improvements which will increase headcount capacity and accommodate new programs in the building, such as Cancer faculty and staff working in the planned Precision Cancer Medicine Building, as well as address deficiencies in the building, will be determined and considered by the Space Committee at a future meeting in 2016.

Additions noted in ***bold red italic type*** in the body of the document were made at the direction of the UCSF Space **Committee**.

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I. Executive Summary

UC San Francisco has grown rapidly in the last decade with the development of the Mission Bay campus site, including the recently opened UCSF Medical Center at Mission Bay. The plan to expand and relocate the children's, women's and cancer services of UCSF Medical Center to Mission Bay was coupled with a decision to build separate academic workspace for the faculty and staff working in the Medical Center in the building that became Mission Hall. After the budget for the building was established, space for desktop research programs then occupying leased space was also programmed into Mission Hall. To accommodate those populations in Mission Hall's desktop environment within the parameters of the project budget and building envelope, while promoting efficient work in a consolidated location, UCSF deployed an open plan workplace design called Activity Based Workspace (ABW). ABW lays out workstations without permanent assignment of private offices or enclosed suites, along with access to workspaces through public corridors, giving UCSF the ability to flexibly manage the space over time to adapt to changing business needs.

Once Mission Hall opened in October 2014, a number of problems became apparent in the ABW environment as occupants moved into the building. One of the most prominent deficiencies was the lack of private offices, a concern that had been voiced by a number of faculty and staff when the design was initially announced. At the urging of the faculty, the Mission Hall Workplace Research Study was commissioned in 2014. Although the full scope of the study is not yet complete, the data collected to date have provided sufficient results that can be used to guide further planning for Mission Hall and future buildings that incorporate open plan workplace design. The results identify a number of aspects of the design that are serving the occupants well, but the preponderance of data suggest less than ideal use of the building, and substantial occupant dissatisfaction and concerns.

Preliminary findings of the Mission Hall Research Study include:

- Low building utilization: Workstations are used an average of 17% of the time, and a maximum of 24% of the time. The low utilization is in part caused by the fact that faculty are more likely to work at home or other remote venues, which is having a negative impact on collaboration that the workspace was supposed to enhance. Focus Rooms are the least utilized spaces, used an average of 6% of the time. There is a need to improve technology in focus rooms, huddle rooms, and conference rooms, by providing more standardization, and increased functionality for users, and to reconfigure individual workspaces to attract faculty to the building.
- A need to improve and clarify protocols and policies for using space. Occupants lack understanding of how to use the workspaces, and they are not familiar with space types.
- Problems with sound transmission, ergonomics, privacy and way-finding, resulting in less than optimal use of the various space configurations.
- A clear need for private offices to address specific functional requirements of many faculty and staff whose jobs include handling of sensitive data or cases.
- Poor occupant engagement, including a lack of involvement of and communication with users during the programming phase, which has exacerbated the current situation.

Based on these preliminary findings of the Mission Hall Research Study and feedback from the community, Chancellor Hawgood and Executive Vice Chancellor and Provost Lowenstein established the Open Plan Workspace Governance Task Force, to make recommendations for mitigation and improvements in Mission Hall, and to develop principles for programming, designing, governing, and occupying open plan workplace environments at UCSF.

The Task Force, which carried out its work between November 2015 to the present, concurs with the preliminary findings of the Mission Hall Workplace Research Study; i.e. that, although there are aspects of the design that work well, there are major deficiencies in the building. The Task Force recommends that a series of actions be taken to correct the deficiencies. These include immediate steps involving the creation of a local governance structure that will identify no- or low-cost improvements in space use and design, improved communication/training that will lead to more efficient use of the space, and establishment of a Mission Hall "Rapid Improvement Fund" to provide resources for these initial measures. Furthermore, the Task Force recommends that planning be initiated for the conversion of the majority of focus rooms into private offices, and mitigation of the significant acoustical problems in defined locations, along with other capital improvements related to technology

infrastructure. The Task Force recognizes that the costs of these larger capital improvements are currently unknown, but it hopes that the campus leadership will do everything within reason to identify the resources needed to carry out these much-needed improvements in as timely a fashion as possible.

With regard to future projects, the Task Force devoted considerable effort to develop principles and guidelines to inform the design of future buildings at UCSF that will incorporate open plan workplace environments. Based on the experience with Mission Hall, the group recommends that future designs rely on a *hybrid* model that includes private offices, open work stations, and other open workplaces that take advantage of the flexibility and efficiency of the open plan workspace design, but also serve the needs of faculty and administrators who require closed, private space. Importantly, these design elements should, to the extent possible, be flexible enough to allow the occupants within a local "neighborhood" to adapt the space to their own, unique functional needs.

The Task Force developed principles/recommendations in the following areas:

- Optimal configuration of workspaces in enclosed and unenclosed rooms that allows for a mixture of private offices and workstations
- Allocation of workspaces that is based on recommended ratios of workstations/offices and support spaces, criteria for occupancy, and local management of assignment of workspaces
- Environmental features that take into account acoustics/sound transmission, ergonomics, privacy, way-finding, signage and displays, and specific characteristics of Focus Rooms/Huddle Rooms and Breakout Spaces, and to have adequate janitorial services to meet the increased density of this workspace model
- Design and use of technology throughout the workspace
- A governance structure that oversees building use protocols and procedures, manages expansion, contraction and movement of programs in open plan environments, audits utilization, and is structured by zones based on based on activity types or programmatic adjacencies

It is the hope of the Task Force that the UCSF Space Committee, which is responsible for strategic planning and oversight of space-related matters throughout UCSF, will concur with the recommendations regarding the need for improvements in Mission Hall. As a start, approval of the aforementioned "Mission Hall Rapid Improvement Fund" will allow for low-cost enhancements such as improved signage, way-finding systems, technology upgrades, placement of locks on spaces requiring extra security, and the like. At the same time, efforts should be initiated to determine the scope and cost of converting focus rooms to private offices, reconfiguring workstations, and mitigating the acoustical problems associated with town centers, recognizing that the extent of implementation of these larger capital improvements will be dependent on the availability of funding.

The Task Force also requests that the Space Committee endorse the application of the planning principles and recommendations developed by the Task Force for future buildings that incorporate the open plan workspace design. With this endorsement, campus leadership could then engage the broader UCSF community, starting with school and department leaders, in a transparent vetting process that conveys the advantages of the open plan workspace design, seeks input from rank-and-file faculty and staff, and is prepared to incorporate new ideas that result in the most functional, efficient and economical working environment possible.

II. Context

<u>Background</u>

UCSF has grown rapidly in the last decade with the development of the Mission Bay campus site, including the recently opened UCSF Medical Center at Mission Bay, the seeds of which were sown in the 1990's. UCSF's physical growth has been driven by its programmatic growth, fueled by its burgeoning research programs and funding, and clinical programs and revenues. Its programmatic success has attracted talented and ambitious faculty and staff, who in turn have attracted philanthropy interested in supporting exciting new programs. UCSF's expansion has also been driven by the need to address its seismically compromised facilities.

At the same time, UCSF is changing its approach to managing its space by seeking to optimize the use of space and the return on its investment in physical facilities. Therefore, UCSF developed a set of space governance policies, which aims to make space assignment and use more transparent and fair, and allows space to be reassigned if it is not used well. Furthermore, UCSF is seeking to reduce its occupancy costs and the impacts on its population and neighbors by consolidating its many remote locations including some of its leased sites into fewer sites.

<u>Open Plan Workspace Environment</u>

Over the past 30 years, UCSF has been gradually moving away from a closed plan environment, starting with its research labs and then moving to its desktop environment. Enclosed suites of desktop workspace with private offices and workstations, and separated by public corridors, have varied in size, configuration, density and utilization across UCSF's buildings. The fixed walls of these suites have limited the flexibility to accommodate programmatic growth and contraction, such that UCSF has undertaken expensive construction to reconfigure existing space or build new space.

In the meantime, design of desktop environments elsewhere has changed to open plan environments, which combines desktop space in workstations or private offices with support spaces such as Focus Rooms, Huddle Rooms and Conference Rooms, where meetings, focused work, phone calls, and confidential activity can occur in unenclosed, non-suite environments. The inclusion of Town Centers, with kitchens and gathering spaces, in open plan environments has also evolved. Construction of open plan environments is found to be more cost-effective than that of the closed plan environments. When UCSF compared traditional suite desktop layouts to open plan desktop layouts, it found that the traditional closed-plan desktop layout requires 20%

more circulation space within the floor plan. This excess is untenable given UCSF's current space and fiscal constraints.

Future UCSF Development and Open Plan Workspace Environments

UCSF intends to apply the open plan design to future desktop environments, so that it can make space use more transparent, accommodate growth flexibly, be cost-effective, and promote collaboration and efficient co-located work. In the next five years, UCSF will seismically retrofit and renovate two existing buildings (Clinical Sciences Building and UC Hall) and construct four new academic buildings that will contain desktop space: the Mission Bay East Campus Phase 1 (Block 33) building, the San Francisco General Hospital Research building, the Mission Bay Neurosciences Research building (Block 23A) and the 2130 Third Street Psychiatry building. A new clinical building, the Precision Cancer Medicine building at Mission Bay, will also be constructed. To optimize the capacity of these buildings and accommodate anticipated demand and future growth, an open plan design will be used in the desktop environments of those buildings. The capacity of each of these buildings has been defined, and the campus is trying to optimize their use by applying a consistent approach to planning design and occupancy.

The Decision to Use Activity Based Workspace in Mission Hall

The plan to expand and relocate children's, women's and cancer services of the UCSF Medical Center to Mission Bay was coupled with a decision to build separate academic workspace for the faculty and staff working in the Medical Center in what became Mission Hall. Many of the clinical programs moved from Parnassus Heights, Mount Zion and Laurel Heights. After the budget for the building was established, space for desktop research programs in global health, epidemiology and translational research, occupying leased space, was also programmed into Mission Hall. To accommodate those populations in Mission Hall's desktop environment within the parameters of the project budget, project schedule, and building envelope, while promoting efficient work in a consolidated location which could be flexibly managed over time, an open plan workplace design called Activity Based Workspace (ABW) was deployed. ABW lays out workstations with support spaces such as focus rooms and huddle rooms in a dense open plan without enclosed suites separated by public corridors. Although open workstation environments within suites exist elsewhere at UCSF, the ABW design without suites had never been done at UCSF before its inclusion in Mission Hall. There was also very limited experience in academic medical centers elsewhere in the use of a 100% ABW design for faculty, staff and trainees. Therefore, UCSF's decision to use an open plan design that included only workstations without private offices (ABW) in Mission Hall was recognized as having an associated risk. The decision to use the

Activity Based Workplace design was made after alternative designs (both closed plan and open plan) were considered and evaluated. The decision was based on the financial constraints, programmatic requirements, desire for optimal utilization of the space, the transparency of utilization in an open plan environment, and the management of desktop space assignment therein.

Initial Experience with Occupancy of Mission Hall

Once Mission Hall opened in October 2014, a number of deficiencies, in addition to the advantages, became apparent in the ABW environment as occupants moved in. One of the most prominent problems was the lack of private offices, a concern that had been predicted by many faculty and staff when the design was initially announced. At the urging of the faculty, the Mission Hall Workplace Research Study was commissioned in 2014. The study is part of a multi-year research effort, which evaluates the open plan desktop workplace environment and its effects on utilization and occupant productivity. The study is being conducted by Perkins + Will, an international research-based architecture and design firm. The study has evaluated the satisfaction, well-being, work effectiveness and engagement of the occupants of Mission Hall. It has also evaluated building utilization, as well as utilization of individual spaces in the building by location and type. The study has benchmarked its data against UCSF's peer institutions. The preliminary results and recommendations are described in the following section.

Because there are no previous implementations of the ABW design of this magnitude, various occupant groups have developed their own guidelines for managing and operating in an ABW environment (see Appendix C), and service level agreements for housekeeping, facilities and technology have been implemented (see Appendix D). Floor coordinators have been identified and ad-hoc floor governance committees have been formed.

III. Mission Hall Workplace Research Study

A summary of the findings, preliminary conclusions and recommended actions of the Mission Hall Workplace Research Study to date are included below. Although the full scope of the study is not yet complete, the data collected to date have provided sufficient results that can be used to guide further planning for Mission Hall and future buildings that incorporate open plan workplace design. The results identify a number of aspects of the design that are serving the occupants well, but the preponderance of data suggest less than ideal use of the building, and substantial occupant dissatisfaction and concerns.

A more detailed description of the Research Study is provided in Appendix A.

Findings

The findings of the Mission Hall Workplace Research Study to date include:
- Satisfaction: A large proportion of participants is not satisfied with the building or have issues with the move to Mission Bay. Concerns include:
  - Lack of functionality
  - Limitations on parking and transportation, and increased commute times
  - Perceived decrease in security
  A minority of participants reported being highly satisfied in the building.
- Well-being: Participants noted a number of concerns related to well-being, including:
  - Lack of appropriate ergonomics in many spaces
  - Lack of privacy
  - Lack of cleanliness
  Many cited positive impacts on well-being, such as improved amenities and access to campus services and colleagues.
- Work Effectiveness: Most participants indicated a decrease in work effectiveness. Concerns include:
  - Mismatches between work functions and the spaces provided
  - Aural and visual distractions in the open plan space
  - A lack of appropriate technology and inconsistent access to mobile technology
  However, a portion of participants have reported that they can work effectively in the building
- Engagement: A large proportion of participants do not understand how to best use the building, citing ineffective communication about how to optimize the use of technology in the conference rooms, as an example. Some have indicated a strain on interpersonal relationships in the open plan environment and disconnection from other campus sites. There are reports of improvements in engagement through increased casual interactions and

visibility.

- Time Utilization Study:
  - Building utilization is low. The study did not provide a utilization baseline to which to compare post-occupancy utilization.
  - The building was never observed with greater than 40% of employees present (high of 604 out of 1501)
  - Workstations are used an average of 17% of the time, and a maximum of 24% of the time
  - Focus rooms are the least utilized spaces, used an average of 6% of the time
- Benchmarking:
  - Limited comparisons are available within UCSF's competitive peer group - it is only comparable to ABW environments that have been implemented by Seattle Children's Hospital and Beth Israel Deaconess Medical Center, but those are on a much smaller scale
  - All other facilities studied within UCSF's peer group provide some amount of private offices
  - Mission Hall provides less space per person than others in its peer group
  - Mission Hall provides a higher percentage of shared space than others within its peer group
- Spatial Analysis: Work is still in progress.

Preliminary Conclusions

- Technology: There is a need to improve technology in focus rooms, huddle rooms, and conference rooms, by providing more standardization and increased functionality for mobile workers. Some units in Mission Hall have already implemented improvements, such as equipping some of the 2nd floor focus rooms or huddle rooms with Mac Mini computers. Improvements in Audio/Visual systems are needed in classrooms, and training is needed for key users and administrators.
- Environmental improvements: Sound transmission, ergonomics, privacy concerns and way-finding should be addressed so that focus rooms, huddle rooms, and breakout spaces can function as intended.
- Private offices: Private offices should be considered in order to address specific functional needs.
- Process engagement: More communication with users during the programming phase would be beneficial. Much of the difficulty at Mission Hall seems to stem from a perceived lack of input from the building users during programming.

<u>Research Results</u>

- Adaptations: Occupants modified the environment in a variety of physical adaptations, such as removing lamps from overhead fixtures, adding portable shades over a work surface, redirecting activity away from break-out areas through signage and word-of-mouth. Occupants also challenge one another through interpersonal means, such as monitoring sounds of others and directing quiet behavior, claiming focus rooms as personal offices, disconnecting from others by limiting engagement and working elsewhere.
- Major opportunities for improvement fall into four categories: Governance, Communication, Non-Capital investments and Capital Investments.

<u>Recommended Actions</u>

The Research Study team recommended that immediate interventions be planned and implemented in Non-Capital Investments and Capital Investments, Technology and Building governance. Other interventions which require programming should be implemented, such as: rebalancing focus/huddle room ratios, converting focus rooms to private offices, customizing neighborhoods, art program, new furniture for huddle rooms, technology package, ongoing training in technology and ongoing communications.

IV. Formation of the Task Force

Based on these preliminary findings of the Mission Hall Research Study and feedback from the community, Chancellor Hawgood and Executive Vice Chancellor ad Provost Dan Lowenstein established the Open Plan Workspace Governance Task Force, to make recommendations for mitigation and improvements in Mission Hall, and to develop principles and guidelines for programming, designing, governing, and occupying open plan workplace environments at UCSF. The Task Force benefited from the work done by the units in Mission Hall to determine how to work in the ABW environment, space governance in the building, and standards and funding for service provision to the building occupants. Therefore, representatives from each of the floors in Mission Hall, as well as an Academic Senate representative, were appointed to the Task Force.

The Task Force membership included:
- *David Teitel*, Professor of Pediatrics (chair)
- *Michael Bade*, Associate Vice Chancellor, Capital Programs and Campus Architect
- *Ivy Chiao*, Senior Project Manager, UCSF Health Major Construction Projects
- *Margaret Damiano*, Associate Dean, Dean's Office, San Francisco General Hospital
- *Robert Hiatt*, Professor and Chair, Epidemiology and Biostatistics
- *Dixie Horning*, Interim Women's Health Administrative Director, UCSF Health, and Associate Chair, Obstetrics, Gynecology and Reproductive Sciences, and Department of History, Anthropology and Social Medicine
- *Janet Myers*, Associate Professor of Medicine
- *Karen Seth,* Practice Manager, Pediatric Brain Center
- *Jon Rueter*, Chief Administrative Officer, Clinical Translational Sciences Institute
- *Alan Venook*, Professor of Medical Oncology and Translational Research
- *Lori Yamauchi,* Associate Vice Chancellor, Campus Planning
- Ex-officio: *Daniel Lowenstein*, Executive Vice Chancellor and Provost
- Ex-officio: *Bruce Wintroub*, Vice Dean, School of Medicine

The Task Force was charged with reviewing the findings of the Mission Hall Workplace Research Study and collecting additional observations from users of the building, with the goals of: 1) making recommendations for improving the work environment in Mission Hall; and 2) developing principles and policies for the application of the open plan workspace design to future buildings at UCSF, including configuration of workspaces and support spaces, allocation of offices and workstations, environmental considerations, technology and governance.

The Task Force met six times over the course of November and December, and continued its work to the present via electronic correspondence to finalize this report.

V. Recommended Application to Programming Mission Hall Improvements/Enhancements

The Task Force carefully reviewed the results of the Mission Hall Workplace Research Study and, coupled to the direct experiences of Task Force members as well as informal feedback from other occupants, concluded that the results appear valid (see "Findings and Preliminary Conclusions" on pages 12-14). There was considerable discussion regarding the appropriate benchmark for building occupancy; e.g. is a 17% occupancy rate of workstations close to what might be expected for a building in which many of the users are busy clinicians who are spending their time in the clinical setting? Despite the ongoing ambiguity as to the minimum occupancy threshold, the members felt certain that a significant number of faculty have chosen to work elsewhere, there are notable regions of the building where occupancy is clearly low or non-existent, and the use of focus rooms (measured as 6% in the study) is far below what was expected.

Based on these conclusions, The Task Force recommends that action be taken to plan and implement improvements and enhancements to Mission Hall. These actions include the following:

1. Immediate establishment of a formal governance structure and communications program. *The School of Medicine Dean's Office will establish the governance structure for Mission Hall, including the Administrative Space Block Committees and the Building Governance Committee. In Mission Hall, Local Functional Units may also be referred to as Sub-Blocks.* UCSF units involved (e.g. Capital Programs, ITS, Facilities Services, Dean's Offices, others) should meet with all sub-blocks and the governance committees to discuss the potential improvements and enhancements for all floors, determine implementation costs (if any), prioritize improvements for implementation, and develop funding plans before implementation begins. A bottom-up structure that empowers the occupants of the building should be created, allowing them to devise changes in the structure and function of their units, with the approval of the oversight committees. Initially the sub-blocks need to be finalized. The premise should be that the unit be as large as feasible so that there is flexibility in assigning specific spaces and in creating redesigns, but small enough so that the people involved know and respect each other, to maximize collegial interactions and thus positive change. For local issues the sub-block should develop a plan and send it to the Administrative Block Committee, which oversees changes on its floors. For block issues such as policies related to conference rooms, sound, the town hall, etc, the Administrative Block Committee should initiate proposals. Oversight of the Administrative Block Committee should be undertaken by the Mission Hall Building Committee run by the building manager, and it would report to the

UCSF Space Committee *(as of April 2016, this will be known as the UCSF Space Management Subcommittee)* for final decisions on all building-wide issues such as major renovations.

In addition, a governance solution is needed for the different management of the 1st floor, which does not have offices and has conference rooms managed by ETS rather than ITS.

2. Immediate creation of a "Mission Hall Rapid Improvement Fund (MH-RIF)". This fund would be used for justified, low-cost, rapidly implemented improvements that will result in notable enhancements of the Mission Hall work environment. Examples include improved signage, way-finding systems, technology upgrades (e.g. sufficient WiFi coverage), placement of locks on spaces requiring extra security, improved janitorial services, and the like. Oversight of the process for publicizing the availability of funds, soliciting and vetting proposals, disbursing the funds and verifying implementation will need to be carried out by an *ad hoc* unit jointly created by the main organizations responsible for the building; i.e. Campus, Health System and School of Medicine.

3. Conversion of focus rooms into private offices. Given the clear benefits of private space for selected faculty, staff and administrators (see section VI for the criteria that can be used for such selection), and the low usage of focus rooms, planning should begin for determining the alterations and associated costs for converting the focus rooms into private offices. Given the minor variation in size and configuration of focus rooms, the configuration of the focus room should support private office use functionality, if converted appropriately. Therefore, the 70-75 sq. ft. standard (described in Section VI) may not be strictly adhered to. Some focus rooms should remain available for use by occupants in workstations. Private offices can also potentially be created by enclosing workstations. Huddle room conversion to private offices should be limited to private offices that are shared and should only be undertaken in locations where huddle room numbers are thought to be excessive. In addition:

- Focus rooms containing columns should not be converted to private offices. Focus rooms with a long side against the wall opposite the door should not be converted to private offices.
- Conversion of focus rooms to private offices should consider the aesthetic and functional needs of the occupants who will remain at workstations. As a rule, focus rooms with windows should not be converted to private offices, and should not interfere with light or ease of access to the shared facilities of those occupants who will remain at workstations.

The Task Force recognizes that this type of capital improvement may translate

into a very significant commitment of new funds. However, the group feels this is well-justified for two main reasons: 1) the conversion would directly meet the needs of a portion of the building occupants who find the current design untenable for their specific work needs; and 2) the conversion would free up a substantial number of workstations and result in a net increase in the occupant capacity of the building. This latter point has notable financial implications. Essentially, freeing workstations by moving faculty (and administrators who perform confidential work) into private offices creates additional workstation capacity within the building, at a cost of furnishing focus rooms as private offices, even including construction of a modest number of additional offices where needed for programmatic balance. On a per-workstation basis this will enhance the capacity of the building to serve the needs of expanding programs housed in Mission Hall at a lower cost compared to either new construction, or to renovations in buildings with overhead services.

4. Mitigation of major acoustic problems. Planning should begin for determining the alterations and associated costs for mitigating the acoustic problems in two main areas: the vicinity of Town Centers and the vicinity of copy machines. Again, the Task Force recognizes that the costs for these improvements may be substantial, but urges they be explored to determine their overall, relative benefit.

5. Improvement of technology infrastructure. A recurring complaint from faculty has been the difficulty of attaining reliable and consistent performance from the technology infrastructure that is required for the successful execution of multi-site, multi-disciplinary clinical conferences. Given the proximity of Mission Hall to the hospital, and the relative lack of video-conferencing capability in the hospital itself, this will be an important, ongoing need for the foreseeable future. The Task Force appreciates that this level of technology performance is a more general, campus-wide challenge. However, the group strongly recommends that an effort be made to explore what is required to achieve success in high-performance videoconferencing at Mission Hall.

As recommended by the Mission Hall Workplace Research Study and the Task Force, certain improvements in governance, communication, technology, non-capital and capital improvements can be implemented quickly, while other improvements obviously require programming and longer-term implementation, such as structural changes which may be necessary to convert focus rooms to offices. The Task Force hopes that the longer-term improvements to Mission Hall would be well underway within a year after the Task Force's recommendations are accepted by the UCSF Space Committee.

VI.   Task Force Recommendations for Open Plan Workspace Environments at UCSF

Following the review of the Mission Hall Workplace Research Study and deliberations on improvements for Mission Hall, the Task Force then turned its attention to the larger issue of the incorporation of Open Plan Workspace design in future buildings at UCSF. The group endorsed the general concept that Open Plan Workspace design has major advantages over the traditional design in academic buildings of enclosed hallways allowing access to partitioned suites with mixed, interior workspaces. These advantages include substantial flexibility in design modification over time, the ability to adapt to the space requirements of neighboring units, new opportunities for collaboration and socialization, and major savings both for initial construction and subsequent modifications.

Based on the experience with Mission Hall, the group recommends that future designs rely on a *hybrid* model of Open Plan Workspace that includes private offices, open work stations, and other open workplaces that take advantage of the flexibility and efficiency of the open workspace design, but also serve the needs of faculty and administrators who require closed, private space. Importantly, these design elements should, to the extent possible, be flexible enough to allow the occupants within a local "neighborhood" to adapt the space to their own, unique functional needs.

In the last phase of its work, the Task Force developed principles and guidelines for the following key elements that should be incorporated in the planning for future buildings:

1. Configuration of workspaces in enclosed and unenclosed rooms
2. Allocation of workspaces and support spaces
3. Environmental features
4. Technology
5. Governance

These are detailed below:

1. Configuration of workspaces in enclosed and unenclosed rooms

Creation/Placement of Private Offices
   a. A private office should be approximately 70-75 sq. ft. in size, configured in a functional floor plan, designed to ensure acoustic privacy and furnished with adjustable height desks, and with the necessary technology to meet the employee's needs. The furnishings within offices of this size will allow the occupant to have private meetings with up to 2

visitors, which is a reasonable standard given the need for efficiency in space design.

b. Placement and distribution of private offices should be considered carefully, depending on the functional requirements of the sub-blocks. Distribution of private offices does not have to be the same for all sub-blocks.

The ratio of private offices to workstations in a building will vary, depending on the building and the local need. For example, the ratio of private offices to workstations in the renovation of Clinical Sciences Building will be 1:2.

Also, a building-wide ratio of private offices to workstations may be established, but its application to individual units or neighborhoods may vary. For example, a building-wide ratio could be 1:4, but an individual unit or neighborhood may not need any private offices while another unit may need 1 private office for every 3 workstations.

Assignment of Private Offices

a. Private offices and workstations should be assigned based on functional activity, not on position or rank.

b. Private offices assignments are based on functional needs for a private environment, but they are not necessarily based on having a unique (or dedicated) environment. Therefore, private offices may be dedicated or unique to a single employee, or they may be shared by multiple employees who are assigned to offices.

c. Qualifications for having a private office should include the following:

1) The employee (faculty or staff) does not have workspaces elsewhere at UCSF,

2) The employee spends a significant amount of time at their office (see below for interpretation of the term "significant")

3) The employee is involved in one or more of the following activities:

   i. "Heads-down" or computer-oriented concentrated work continuously throughout the day

   ii. On the phone continuously throughout the day

   iii. In small group private meetings frequently throughout the day (1 – 2 people)

   iv. In confidential conversations throughout the day at their desk (e.g. human resources, patient-oriented)

   v. A job which involves high emotional and intellectual stress

If employees are **not** at their office a significant amount of time but their functional work requires private space per the criteria noted above, one possible solution is to share offices. For example, three clinicians whose

work is complementary (for example, share coverage for a specific set of procedures), who spend 30% of their days at their desks and who need private offices for their functional work outside the clinical environment may be assigned to share two offices or space equivalent of two offices, or two people may share one office.

The definition of what constitutes a "significant" amount of time may vary from unit to unit and be influenced by the overall availability of private offices. However, as a general rule, "significant" use should result in an <u>overall</u> occupancy rate of private office space for a given unit being approximately 30- 40%. Please note that this initial metric is based on what the Task Force has appraised to be a reasonable goal, but it will be carefully re-evaluated on a regular basis as we learn more about space utilization in the open plan environment.

d. Private offices should not be assigned to faculty or staff with a private office elsewhere in the UCSF footprint, or to Emeritus Faculty. No more than one private office shall be assigned to an individual faculty or staff.

e. The need to conduct HIPAA-compliant or Human Resources compliant conversations on occasion does not merit a private office; these episodic conversations can take place in Focus or Huddle rooms. The open plan workspace design has been determined to be compatible with HIPAA-compliant behavior, which is a UCSF training requirement. In some cases, HIPAA-compliant behavior in open plan workstations with Focus or Huddle Rooms may require major behavioral change and inconvenience to faculty. Enclosed rooms should be designed so that building occupants (both those inside and outside of enclosed rooms) will not be able to distinguish specific words or conversations.

Assignment/Placement of Workstations

a. Workstations may be dedicated to a single employee or may be shared by multiple employees who are assigned to that workstation. Shared assigned workstations are different from hotel stations, which are available for anyone without an assigned space.

b. Residents are at their desks a small percentage of the time and will therefore use hotel stations for their work, instead of having assigned dedicated workstations. ACGME Fellows must have a unique assigned workspace per ACGME rules. Non-ACGME Fellows may be assigned a unique workstation depending on need.

c. Workstations should be co-located for employees with similar jobs together, e.g. billing staff, scheduling staff or research coordinators, particularly if they interact in their work or cover each other's duties.

d. Where feasible, workstations which have which desks parallel to the adjoining circulation path should be reconfigured so that the desks are perpendicular to the adjoining circulation

e. Consider moving workstations away from walls to eliminate dead-end circulation.

2. <u>Allocation of Workspaces and Support Spaces</u>

Ratios of Support Spaces to Workstations/Offices and Placement of Support Spaces
a. The ratio of Focus Rooms to workstations should be decreased to a ratio to be determined in consultation with sub-blocks and space governance structure for the building, given the limited use of Focus Rooms noted in the survey. Currently, the ratio of Focus Rooms to workstations in Mission Hall is 1:4; usage data suggests that this ratio could be decreased to as much as 1:10.
b. Currently, the ratio of Huddle Rooms to workstations in Mission Hall is 1:19. Given the relatively high demand for Huddle Rooms, the ratio of Huddle Rooms to workstations/private offices may be increased, as determined in consultation with sub-blocks and the space governance structure for the building.
c. Focus Rooms can be dedicated to sub-blocks and modified to support those units, but they must be open for use by occupants from other sub-blocks.
d. Focus Rooms should be furnished at the same level as a private office unless they serve specific purposes, such as being configured as a photo gallery or relaxation space.
e. Hotel stations should be furnished at the same level as a dedicated workstation, including furniture, ergonomics (such as adjustable height desks), and technology.

Local Management of Assignment of Workspaces
a. Assignments of private offices and workstations should be locally managed by each sub-block, under the auspices of the space administrative block committee or similar group. Disagreements between sub-blocks occupying the same floor shall be adjudicated by this oversight committee. Given the finite number of offices and workstations, it is imperative that assignments be reevaluated on a regular basis and reallocated based on those reevaluations. Assignments of private offices or workstations should be based on occupancy utilization, which should be audited by the sub-blocks at least annually; the Task Force suggests target occupancy utilization of 40% on average.
b. While sub-blocks may manage private office and workstation assignment within their units, each sub-block is accountable to a space administrative block committee. For example, underutilized workstations and offices may be reassigned to other sub-blocks by the space administrative block committee.

3. Environmental Features

Acoustics/Sound Transmission
   a. Building construction design should ensure that noise from people walking through the desktop areas is minimized, with no audible reverberation through the floors.
   b. Town Centers should be designed to contain sound/noise and reduce noise impacts on adjacent open workstations.
   c. Focus Rooms should be acoustically isolated to the extent possible, such that adjacent conversations are unintelligible. If Focus Rooms are converted to private offices, sound insulation techniques should be tested so that there is enough insulation to make adjacent conversations unintelligible.
   d. The nature of ambient noise in the vicinity of heads-down open workstation areas will depend on the functionality of neighborhoods. Some spaces may be designated as "Quiet Space" (requiring low volume speech with the option of using headphones), while other spaces may be designated as "Open Conversation Space (in which normal volume conversation is expected and common). (see Zoning principle under E. Governance)
   e. Conference rooms should be designed with minimum background noise (from ventilation systems, for example) and microphones placed so that people calling in can hear the meeting deliberations. (These specific problems exist in some of the 1st and 2nd floor conference rooms in Mission Hall.)
   f. Consider acoustic treatment near copy areas to minimize noise impacts on adjacent occupants. Currently, in Mission Hall, copy areas are noisy because copier users have to enter their codes and wait for their printouts, so they queue around the copiers and have conversations, which are disruptive to those nearby.
   g. Breakout spaces in the middle of the open plan environment should be acoustically separated from open office workspaces. Need for breakout spaces should be evaluated locally, and repurposing of breakout spaces should be considered, if they are not needed.

Ergonomics
   a. Efforts should be made to obtain favorable pricing on sit/stand desks so they can be incorporated as a standard element in furnishing open plan workspace
   b. Environments; panel dividers between workstations should be adjustable in height so that, the panel divider can be raised if the desk is raised.
   c. Furniture in Focus Rooms, Huddle Rooms and conference rooms should be comfortable and ergonomically well-designed for long work periods.

Privacy
   a. Monitors at open workstations should be configured so that:
       1) Occupants are not approached from behind by others and those approaching them cannot view their monitors.
       2) Occupants do not have their backs to the doors of the Focus Rooms and monitors in Focus Rooms cannot be viewed by those entering or passing by Focus Rooms.
       3) Those walking along circulation paths cannot view monitors of occupants whose workstations are adjacent to such paths.
   b. Workstations of those dealing with confidential Human Resource or payroll data, e.g. administrators, should be located next to walls, Focus Rooms or unoccupied spaces.
   c. HIPAA compliance in an activity-based workplace is similar to that of a hospital environment. While others may hear one side of the conversation, it is similar to a nurse or doctor hearing a conversation about a patient in a hospital setting. It is important to note that in the open space setting of the type considered here, it is one's behavior, not the environment, that determines HIPAA compliance.

Wayfinding
   a. Use identifying logos or program names to locate programs, through placement in carpets, banners hanging from ceiling, or permanent wall signage.
   b. Erect touch screen panels near the elevators on each floor (as are used in the Mission Bay hospitals and clinics), which locate individuals, programs and/or conference rooms on the floor.
   c. Place directional signs near the elevators and internal stairways to conference rooms so that those who reserve conference rooms but are unfamiliar with their locations can find them, thereby minimizing disruption to nearby occupants.
   d. Conference room reservations should be made electronically, to the extent feasible, instead of through individuals, and directions to the conference rooms should be electronically supplied to users.

Features of Focus Rooms/Huddle Rooms and Breakout Spaces
   a. Note references to Focus Rooms and Breakout Spaces in Acoustics and Privacy principles above.
   b. Design and locate Breakout Spaces so they are more confined and less disruptive to those in nearby open office areas.

Signage and Displays
   a. Use wall-based or ceiling based signage to identify programs.
   b. Use art to personalize program neighborhoods.

4. Technology

Classrooms
   a. Audio recording in classrooms – provide training and install high quality microphone control equipment.
   b. Video recording in classrooms – provide training on how to use video recording equipment.
   c. Dual display screens – provide training on how to best use dual screens (consider alternative dimensions, screen layouts and locations/placement of screens, as well as two podiums for classrooms that can be divided).
   d. Address unique A/V requirements of units (e.g. the needs of Epidemiology and Biostatistics for teaching programs in Mission Hall).

Conference Rooms
   a. Conference rooms should be equipped with high-quality, dependable and robust systems which enable multi-site, multi-disciplinary videoconferencing (which the Mission Hall conference room systems do not accommodate). This is critically needed for patient care and research conferencing. Adequate audio from speakers and ceiling microphones to ensure that remote and local have high quality communication.
   b. Adequate video capabilities and bandwidth to ensure that multi-site, multi- disciplinary videoconferences have the capacity to allow clinicians and researchers at each site to evaluate all imaging studies (still images and videos) at a diagnostic level.
   c. Ensure that training in the technologies allows for ease-of-use of the equipment; such training can be in-person, via local liaisons who function as super-users, online catalogs, easily accessible training videos, step-by-step apps connected to the systems, etc.
   d. Multiple HDMI cables to connect to laptops for screen display that are clearly labeled and standardized.

Focus/Huddle Rooms
   a. Desktop computers with monitors that can also be connected to laptops (if desired) (OR monitors only that can be connected to laptops) to support prolonged work, including access to webinars, the EMR, and all other UCSF servers and digital assets.
   b. Consistency of technologies in Focus/Huddle Rooms as well as across sites with training, ongoing support and regular reevaluation to ensure ease-of-use.

c. While appreciating the need for consistent technologies, unique needs should be accommodated, in terms of equipment and bandwidth, such as the need for specialized computers to access large data sets or have telemedicine capabilities.

Copy Areas
   a. Shared copiers – Study source of printing demand for shared copiers, to determine if more printers are needed to increase capacity of printing and decrease queues of those waiting for their printouts, or if occupants can rely more on digital filing and less on hard copy printouts.
   b. Personal printers – Establish a personal printer protocol, e.g. schedulers have their own printers.
   c. Faxes – Explore programming fax machines to direct them to servers and establish protocol for departments to check servers regularly (hourly?) for incoming faxes and notify users accordingly, so that fax printouts are not left for others to view.

Workstations
   a. Speakerphones at Open Office Workstations – disable speakerphone function on all Open Office Workstation phones, provide guidance on alternative behavior, and provide headsets for workstation occupants.
   b. Wi-Fi connections should be planned well.

Building-Wide
   a. Personal devices – evaluate personal device availability by sub-block to understand where standardization of technology services is needed. This includes headsets, smartphones, and tablets in addition to computers. For computers, platform compatibility should be ensured for both Apple and Windows devices.
   b. Training in technologies – Provide in-person training on technologies, a catalog of resources, links to training modules, and in-house department liaisons/experts, including training on doing conference calls and transferring calls between phones.
   c. Consistent tech support – Evaluate inconsistent tech support and determine resolution of differences (develop and provide customer service protocols for IT support to establish baseline service levels).
   d. Chargebacks for tech support, i.e. to connect to Parnassus Grand Rounds – Communicate policy changes for IT support and their rationales, including what charges are being assessed and why; provide adequate training for departments to reduce need for IT support and greater ease of use.
   e. Disparate help desks – Combine two help desks, i.e. UCSF and SOM, to avoid frustration and decreased use of technology and consider

streamlined approach to providing tech support (same for future buildings).

f. Wi-Fi signal when moving between workspaces – Evaluate Wi-Fi connectivity challenges and devise strategies for addressing them (test connectivity consistency in building prior to occupancy and evaluate ongoing connectivity).

g. Phone connectivity to outside systems within US and to other countries – Evaluate calling restrictions on outside numbers and adjust where appropriate; consider global conference bridging/Skype (consider removing calling restrictions, establish and communicate protocols for phone restrictions).

h. Printing costs – Communicate explanation for high printing costs and work with departments to reduce costs, for instance by setting print defaults to black & white (communicate costs and rationales to departments in advance). Explore other strategies for reducing printing costs.

5. <u>Governance</u>

Governance Structure
a. Define sub-blocks. See Appendix B for list of Sub-blocks in Mission Hall.
b. A governance structure for open plan workspace buildings should include:
   1) Sub-blocks, which will manage the allocation and assignment of workstations and private offices, the unique utilization of specific focus rooms, and the overall design and signage within their area.
   2) Space Administrative Block Committees (which could cover single floors or pairs of floors) which will oversee the functional units and manage the principles and protocols for the operation of common and support areas, such as town centers, conference rooms and shared service areas.
c. Building-wide governance committee will oversee the space administrative block committees, establish building wide principles and protocols, and will oversee the management of the building.
d. A Building Facilities Manager should be designated and in place before the building is occupied to prepare occupants for move-in.

Building Use Protocols and Procedures (see Appendix C, UCSF Office Guidelines for Activity Based Work (ABW) Environment)
a. Guidelines for managing the open plan environment, including: building management, focus and huddle room usage, service level agreements (see Appendix D, Service Level Agreement for Mission Hall).
b. Occupant guidelines on electrical appliances, Focus and Huddle Room use, garbage/recycling/ composting, kitchen and common space use, noise (common/breakout spaces, conversations, environmental noise, meetings, phone use), scents (flowers, perfume/personal care products),

security (badges, securing personal belongings), and personal printers.
  c. Cost-sharing agreements with occupant units, their respective departments and schools/vice chancellors, and the campus. Such agreements should address maintenance, housekeeping, common/support area support (IT, other).

Zoning Based on Activity Types or Programmatic Adjacencies
  a. Floors should be zoned by activity and programmatic adjacencies (i.e. programs which need to be close or adjacent to one another) in consideration of the various activity types and their associated behaviors (e.g. noisy and talkative, quiet and heads-down). Such zoning should be determined by the sub-blocks, in consultation with the administrative block committees.

Managing Expansion and Contraction and Movement of Programs in Open Plan Environments
  a. Occupancy and utilization of workspaces should be audited by the sub-blocks at least annually, especially as recruitments and new hires take place. Expansion and contraction plans by occupant units should be reviewed by the departments and the dean(s)/vice chancellor(s) to whom the occupant units report.
  b. Such audits should be confirmed for accuracy and completeness under the auspices of the space administrative block committee, and used by the reviewing bodies such as departments, Schools and the University administration, to reassign and reallocate workspace based on the principles and guidelines recommended by the Task Force and as applied locally.

VII. Conclusions

The Open Plan Workspace Governance Task Force reached the following conclusions in its discussions:

Mission Hall Improvements: The Task Force concurs with the preliminary findings of the Mission Hall Workplace Research Study that there are major deficiencies in the building that need to be addressed. It strongly recommends that immediate interventions be taken to correct the deficiencies, which are in the form of governance, communication/training, and non-capital improvements, and that low-cost modifications be supported via a "Mission Hall Rapid Improvement Fund". The Task Force suggests that longer term improvements, most notably the conversion of Focus Rooms to Private Offices, mitigation of acoustic problems, and enhancement of technology infrastructure, be undertaken as soon as is reasonably possible based on the availability of funding; ideally these should be well underway within one year after the acceptance of the Task Force's report and recommendations by the UCSF Space Committee.

Open Plan Workspace Environment: The Task Force accepts the premise that UCSF intends to apply the open plan design to future desktop environments, so that it can make space use more transparent, accommodate growth flexibly and cost-effectively, and promote collaboration and efficient co-located work. It is imperative, however, that future open plan desktop environments at UCSF be carefully designed and executed to meet the principles and guidelines recommended by the Task Force. The local application of the recommendations of the Task Force to the design of future specific desktop environments should be done with end-user/occupant participation and input, to ensure that future buildings with open plan workspace designs are successfully used by occupants.

In particular, attention should be paid to environmental features, such as acoustics/sound transmission, ergonomics of furniture, privacy, wayfinding, and signage/displays. Also, technology should be carefully planned to serve the building, as well as individual floors and neighborhoods (with their sub-blocks). UCSF should develop partnership-based technology investment strategies between the Campus, the Schools, and Departments or other units. The workforce requires consistent and purposeful investment in workplace technology across School and Departmental (or other unit) boundaries.

Inclusion of Private Offices: Open plan environments in future academic and administrative buildings should include private offices. They should be approximately 70-75 sq. ft. in size (UCSF standard), configured in a functional floor plan, designed to ensure acoustic privacy, and furnished with ergonomic

furnishings including adjustable height desks and with the necessary technology to meet the employee's needs.

Assignment of Private Offices: Private offices assignments are based on functional need for a private environment, but this does not necessarily mean a unique (or dedicated) environment. Therefore, private offices may be dedicated to a single employee or they may be shared by multiple employees assigned to offices. Assignments of private offices and workstations should be managed by sub-blocks. Disagreements between sub-blocks occupying the same floor shall be adjudicated within the administrative structure developed for the building. Given the finite amount of offices and workstations, it is imperative that assignments be reevaluated on a regular basis and reallocated based on the reevaluations. Assignments of private offices or workstations should be based on occupancy utilization, which should be audited by the sub-blocks. A standardized methodology for assessing utilization that can be carried out consistently and transparently by administrative staff should be developed.

Governance: A formal governance structure for planning and operating the open plan environment should be established. Sub-blocks should be identified and committees should be formed to manage space within logical administrative blocks and building-wide. Building-wide protocols and policies should be developed and promulgated. Open plan environments should be zoned by activity types and programmatic adjacencies.

Appendices

Appendix A: Mission Hall Workplace Research Study

The Mission Hall Workplace Research Study is being conducted by a team whose Principal Investigator is Dr. Nancy Adler, Professor of Psychiatry at UCSF. The team members also include Dr. Janice Barnes, Perkins + Will workplace research principal-in-charge. Dr. Jean Wineman from the University of Michigan, Dr. John Peponis from Georgia Tech University, along with Perkins + Will staff in New York and San Francisco. The study's scope has been reviewed and approved by UCSF's Institutional Review Board (IRB), along with formal review by the Academic Senate, and, to the extent possible, will publish its results in academic, journals as requested by UCSF faculty.

Engagement Tactics

The research team has used the following engagement tactics:
- Interviews with department chairs
- Focus groups with faculty, staff and students
- Time utilization studies of the actual usage of each space in Mission Hall based on week-long observations
- Spatial analysis of Mission Hall's composition
- Benchmarking Mission Hall's spatial characteristics against recent facilities built by other institutions
- Observation of previously occupied locations and Mission Hall
- Online survey of Mission Hall occupants

Participation

To date, 270 UCSF personnel have participated in the study, including 17 chairs, 104 faculty, 138 staff and 11 miscellaneous others. A total of 50 sessions were held, including: 27 in-person focus groups, 21 phone interviews and 7 interviews via email. 90 people participated in the study before occupancy of Mission Hall, and 247 people participated after occupancy of Mission Hall.

Findings

The findings to date include:
- Satisfaction: A large proportion of participants are not satisfied with the building or have issues with the move to Mission Bay. Concerns include:
  - Lack of functionality
  - Limitations on parking and transportation, and increased commute times
  - Perceived decrease in security

A minority of participants reported being highly satisfied in the building.

- Well-being: Participants noted a number of concerns related to well-being, including:
  - Lack of appropriate ergonomics in many spaces
  - Lack of privacy
  - Lack of cleanliness

  Many cited positive impacts on well-being, such as improved amenities and access to campus services and colleagues.
- Work Effectiveness: Most participants indicated a decrease in work effectiveness. Concerns include:
  - Mismatches between work functions and the spaces provided
  - Aural and visual distractions in the open plan space
  - A lack of appropriate technology and inconsistent access to mobile technology

  However, a portion of participants have reported that they can work effectively in the building
- Engagement: A large proportion of participants do not understand how to best use the building, citing ineffective communication about how to optimize the use of technology in the conference rooms, as an example. Some have indicated a strain on interpersonal relationships in the open plan environment and disconnection from other campus sites. There are reports of improvements in engagement through increased casual interactions and visibility.
- Time Utilization Study: Findings include:
  - Building utilization is very low
  - The building was never observed with greater than 40% of employees present (high of 604 out of 1501)
  - Workstations are used an average of 17% of the time, and a maximum of 24% of the time
  - Focus Rooms are the least utilized spaces, used an average of 6% of the time
- Benchmarking:
  - Limited comparisons are available within UCSF's competitive peer group
  - All other facilities studied within UCSF's peer group provide some amount of private offices
  - Mission Hall provides less space per person than others in its peer group
  - Mission Hall provides a higher percentage of shared space than others within its peer group
  - Mission Hall's spatial composition is comparable to ABW environments that have been implemented by Seattle Children's Hospital and Beth Israel Deaconess Medical Center.
- Spatial Analysis: Work is still in progress.

<u>Preliminary Conclusions</u>

- Technology: There is a need to improve technology in Focus Rooms, Huddle Rooms, and Conference Rooms, by providing more standardization, and increased functionality for mobile workers. Some units in Mission Hall have already implemented some improvements, such as equipping some of the 2nd floor Focus Rooms or Huddle Rooms with Mac Mini computers. Improvements in Audio/Visual systems are needed in classrooms, and training is needed for key users and administrators.
- Governance and Policy: Improve and clarify protocols and policies for using space. Users lack understanding of how to use the space and they are not familiar with the space types.
- Environmental improvements: Sound transmission, ergonomics, privacy concerns and way-finding should be addressed so that Focus Rooms, Huddle Rooms, and Breakout Spaces can function as intended.
- Consider inclusion of private offices to address specific functional needs
- Process engagement: More communication with users during the programming phase would be beneficial. Much of the difficulty at Mission Hall seems to stem from a perceived lack of input from the building users during programming.

<u>Research Results</u>

- Adaptations: Occupants modified the environment in a variety of physical adaptations, such as removing lamps from overhead fixtures, adding portable shades over a work surface, redirecting activity away from break-out areas through signage and word-of-mouth. Occupants also challenge one another through interpersonal means, such as monitoring sounds of others and directing quiet behavior, claiming focus rooms as personal offices, disconnecting from others by limiting engagement and working elsewhere.
- Major opportunities for improvement fall into four categories: Governance, Communication, Non-Capital investments and Capital Investments.

<u>Improvements (with examples)</u>

The Mission Hall Workplace Research Study team came up with four areas in which improvement could be instituted (Governance, Communications, Non-Capital Investment and Capital Investment) and outlined examples in each area. Note that these are examples from the research team and not necessarily recommendations of the task force. For example, many of these recommendations have already been

implemented in Mission Hall, some apply to processes already completed at Mission Hall such as the move, and the division of responsibility by Department does not match the physical or administrative structure of Mission Hall.

Governance

Building Use
- Define protocols and procedures for conference, huddle room, and focus room use
- Institute a reservation system for all meeting spaces
- Define protocol for using Break Out spaces
- Define "good neighbor" policies for behavior in the open work environment
- Define Focus room usage and ownership

Departmental ownership and chargebacks
- Provide guidance for what physical adaptations are allowed in the space
- Define protocols for using and maintaining shared environments, e.g. Town Centers
- Define funding protocols for typical office service materials, e.g. paper products and beverages
- Communicate strategy for managing printing costs and relative market costs
- Assign and reassign space as appropriate

Decision-Making
- Institute Building-Wide Governance Committee
- Consider pooling resources to fund Facility Operations Manager position similar to Cancer Research Center and Cardiovascular Research Center

Communications

Planning process
- Increase communication with the users during the programming phase Design process
- Conduct mockups and user input on furniture and space types Move process
- Improve move and post-move communications

Post move process / day 2
- Update website with move progress
- Provide multiple modes of communication to capture broader occupant base

Ongoing issues
- Develop an overall change management and communications plan for future projects
- Develop communications about parking, retail and café tenant, building security, and other ongoing concerns of occupants

Non-Capital Investment

Zoning

- Create new seat assignment zones based on activity types [schedulers versus researchers as an example] to reduce distractions and fully support all roles. This in turn should improve interpersonal relations in the open workstation area.

Technology

- Disable speakerphone at workstation to minimize noise in the open workstation area.
- Provide technology training for all new tools.
- Follow-up evaluations and studies: printing volume, bandwidth, calling restrictions.
- Evaluate and improve customer service as needed.

Maintenance

- Evaluate existing maintenance program to address cleanliness concerns. Improve as needed.

Capital Investment

Architectural

- Town Center acoustics
- Turnstiles at elevator lobby
- Rebalancing focus/huddle room ratios
- Converting Focus Rooms to offices
- Adding offices

Signage

- Way-finding
- First floor graphics
- Customize neighborhoods
- Art

Furniture

- Focus Room task chairs

- Focus room sit stand desk
- Trash bins in conference rooms
- Furniture for new Huddle Rooms

Technology
- Technology in Focus Rooms
- Technology in Huddle Rooms
- Visual privacy at workstations

Appendix B: Sub-blocks in Mission Hall

Sub-blocks in Mission Hall

2nd Floor:
1) Data System/Biostatistics
2) Clinical Epidemiology
3) Chronic Disease Epidemiology, and PhD and TICR students (includes a cluster of workstations on loan to ICHS)
4) SF Coordinating Center (multi-center trials)

3rd Floor:
1) AIDS Research Institute (ARI)
2) Global Health Sciences (GHS) Executive Director unit
3) Bixby Center for Global Reproductive Health, Pre-Term Birth Initiative (PTBI), Maternal Reproductive Health
4) CAPS (Center for AIDS Prevention Studies)
5) Global Health Group, GHS Finance, GHS Education,
6) Pacific AIDS Education & Training Center (PAETC - part of Family & Community Medicine)
7) Global Strategic Information (GSI)

4th Floor:
Most of the 4th floor is assigned to Pediatrics, with the exception of ICHS, to which workstations are loaned. Therefore, Pediatrics manages their workstations as a sub-block, even though multiple divisions within Pediatrics occupy the floor.

5th Floor:
1) Pediatric Heart Center (CT Surgery, Cardiology)
2) Hospital Medicine and General Pediatrics
3) Urology, Neonatology, Critical Care
4) Orthopedics, Fetal Surgery, Rheumatology
5) Gastroenterology, Nephrology

6th Floor:
1) CTSI with Women's Health CRC (Clinical Research Center)
2) Units in the Cancer Center (Hematology/Oncology, GI Research Coordination, GU, Urology, Radiology, Pathology, Surgery

7th Floor (not including the Chancellor's Office):
1) OB-GYN

Appendix C: UCSF Office Guidelines for Activity Based Work (ABW) Environment

The activities based work environment is modeled on activities accomplished during the day. Occupants have a home base at their dedicated (assigned) workstation with access to private spaces to meet specific work activities. The ABW model flips the traditional office model by making the open work stations the quiet space (as in a library) and the enclosed (unassigned) spaces become the places for conversation as well as privacy. This model requires new ways of managing and supporting ABWs as well as encouraging new norms in the ways to work in the space. Outlined here are some proposed guidelines for managing and occupying Activity Based Work environments at UCSF.

Guidelines for managing an ABW

Building Management
A full-time building facilities manager should be hired shortly before occupancy to coordinate move-in, manage any building transition issues (i.e., ensure service levels are met, technology works, training is provided, etc.), and manage building wide day-to-day operations. This position serves as a liaison between building occupants and campus services and represents occupant interests and is therefore a shared expenses across all occupant departments.

Focus and huddle room usage
Access to and use of huddle rooms should be agreed upon by leadership/stakeholders prior to move in. If access is open to all focus and huddle rooms by all personnel with access to the ABW building irrespective of department affiliation, maintenance costs should be the responsibility of the campus.

Governance
A governance structure should be developed and put in place prior to occupancy. Membership should be based on level of input required (floor, sandwich, building) and should include faculty and staff at the appropriate levels. Initial guidelines should be in place and widely and consistently distributed to all occupants prior to move in with reviews and updates made based on input from occupants post-move. Annual as well as ongoing (as needed) review and updates should be the expectation.

Private Office Assignments (if applicable)
In a primarily ABW environment with few private spaces available for offices, individual floor criteria should be addressed after first considering basic building-wide policies. Faculty leaders (chairs, directors, and division heads) should be assigned a private space. Faculty full-time presence (in the space 4 work days per week) in the ABW should have priority over faculty who are physically present less than 3 work days per week. In all instances, assigned private offices that are not occupied (i.e., due to travel, off-site work, vacation) shall be made available for ad hoc use by other occupants.

Service level agreements

Service level agreements (SLA) for all campus services (custodial, security, maintenance, document media and mail, etc.) must be in place prior to occupancy of the building. SLAs should be developed in partnership with stakeholders and include input from department managers and staff with facilities management expertise. Density or occupancy levels should be taken into account when developing SLAs. See attached SLA recommendations for Mission Hall.

Technology

Technology should be state-of-the-art but be tested to ensure it works and meets occupant needs prior to occupancy. Technology includes copy machines, telephony, video conference equipment, IT solutions for seamless transition from workstation to focus and huddle room with the ability to transfer computer work sessions and telephone calls. Easy to follow users guides should be provided for each different type of equipment. User training should be provided on the use of technology both before and after occupancy, with refresher training available on a regular basis post occupancy.

Guidelines for occupants of an ABW

Electrical Appliances:
- Electrical appliances, including but not limited to space heaters, refrigerators, coffee machines, and microwaves, cannot be installed or plugged in at any workstation.

Focus and Huddle Rooms:
- Please do not leave your belongings (papers, computer, etc.) for an extended period of time in the focus or huddle rooms. These are meant for everyone's use.
- Huddle, focus, and conference room doors should be left open after use, and the lights turned off.
- Please do not decorate the focus, huddle or conference rooms with personal items, such as awards and family pictures; please enjoy these items in your workstation.

Garbage/Recycling/Composting:
- Please place food and any empty food containers in trash or compost at the end of the work day and before any vacations that you may take.

Kitchen and Common Space Use:
- Please clean up after yourself. Wipe down surfaces that are dirty (including the microwave and sink), wash your dishes and bring them back to your desk. Please do not leave any of your dishes in the kitchen area.
- Please keep the Printer/Copier/Scanner/Fax areas clean and organized.

Noise:
Common/Breakout Spaces
- Please be mindful of noise and cellphone conversations in these spaces if surrounding workspaces are occupied.

Conversations
- Please take conversations that are longer than a few minutes to a focus or huddle room. If this is impossible, please keep voice levels down so as not to disturb those around you. If conversations need to take place near your workstation, please sit around or near the workstation and avoid conversations across partitions.

- Attempt to walk through space without disrupting those engaged in work. Look for visual cues that someone might not want to be disturbed (headphones, head down). If someone is visibly occupied and your question can wait, return later or send an email.

- Say hello at the start of the day. While polite at home or on the street, multiple acknowledgements during the day can be disruptive.

Environmental Noise
- Listen to music over headphones, not speakers. One person's music is another person's noise.

- Your workstation is in an open environment. Please be mindful and considerate of your neighbors and refrain from making loud noises.

Meetings
- Please conduct all meetings or confidential discussions in a focus, huddle, or conference room.

Phone Use
- Avoid using the speakerphone option on your desk phone.
- Develop a softer telephone voice. Please park calls that are longer than a few minutes and take them in a focus or huddle room.
- Adjust telephone ring loudness. Set desk phone to minimum ring volume. Set cell phone and pagers to the minimum ring volume or vibrate and/or flash mode.
- Consider the confidential matter of the calls you make or receive, even if they are short. Budget and personnel issues should generally be done in private rooms.

Scents:
Flowers
- If you receive (or bring) flowers, please be mindful that they may trigger allergies among colleagues. Please consider bringing flowers home at the end of the day.

Perfume/Personal Care Products

- Please refrain from the use of perfume, cologne, and other scented personal care products as these, too, may trigger allergies.

Food

Again scents travel

Basic snacks and drinks can be consumed at your ABW but any cooked or hot food should be consumed in the kitchen areas

Non packaged food cannot be kept at ABW's

Security:

Badges

- Please wear your UCSF ID badge in a visible location at all times. The badge indicates to the security guards and your coworkers that you are a UCSF employee.

Lock Up Your Stuff

- All personal items should be locked in the storage unit in your ABW. Please be sure to secure your laptop to your desk. UCSF is not responsible for replacing personal items that are lost or stolen.

Personal Printers:

- Personal printers (wireless or otherwise) cannot be installed or plugged in any focus, huddle, or conference room. Personal printers cannot be plugged in at individual ABWs without prior approval by management and/or floor governance committee.

Appendix D: Service Level Agreements Proposed for Mission Hall

Service Level Agreement (proposed): Mission Hall			

Service Center overseeing/ providing service:	Service Area:	Service	Service level (proposed)
Facilities	Housekeeping	Vacuum high traffic areas	2X / week
		Vacuum entire floor, includes workstations	weekly
		Wipe hard surfaces nightly in conf rooms, town hall, breakout areas	weekly
		Wipe hard surfaces in focus, huddle rooms	empty 2X / week
		Pick-up garbage at workstations	empty 5X / week (every week day)
		Pick-up garbage and recycle in common areas	3X (+) / day
		Fill hand soap dispensers in restrooms	2X/day and nightly
		Fill paper towel dispensers in restrooms and town centers	weekly
		Provide dish soap at sinks in town centers	refill dish soap 1X /week
		Provide sponges at sinks in town centers	1 sponges at each sink changed out 1X /
		Restroom wash basin counters	wipe down 3X / day
		Clean mold in bathroom and town center sinks	1X / week
		Clean out Town Hall refrigerators and microwaves	clean last Friday of each month
		Carpets	clean entire floor 2X /year; spot clean as needed
		Stairwells connecting Town Centers	wipe nightly; mop 2X / week
		Custodial services for Wellness rooms	Clean wellness rooms nightly; clean wellness room refrigerator 1X / month
		Wash inside of perimeter windows	1X / year
		Wash outside of perimeter windows	1X / year
Facilities	MH Facilities	Filtered water machines	Provide 2 hot/cold filtered water machines in every town center
		Water filters	Change filters on all filtered water machines in MH every 2 months
		Maintenance contract for water machines	Manage and support maintenance contract for water dispensers; call for service
		Microwaves	Supply a total of 6 professional grade microwaves / sandwich
		Microwave maintenance	Call for service, repair or replace if needed
		Refrigerator	Supply a total of 6 professional grade refrigerators / sandwich
		Refrigerator maintenance	Call for service, repair or replace if needed
		Floor lamps	2X/ month check bulbs in floor lamps and replace if extinguished
		Overhead lighting	Replace overhead lights throughout floor; remove light tubes or insert lighting lens when needed because of glare
		Wayfinding	Purchase, install and maintain signage that directs employers and visitors to reception desk, conference rooms, restrooms, town centers
		End cap and workstation signage	Provide endcap and workstation name tags for every endcap and workstation at MH
		Confidential document shredding	Provide one full-size locked document bin for each floor at MH; each bin should be emptied 1X / month

Service Level Agreement (proposed): Mission Hall			
Service Center overseeing/ providing service:	**Service Area:**	**Service**	**Service level (proposed)**
ITFS/Tele Health	**Conference/Focus/Huddle**	Maintain updated instruction sheet	Provide instructions for each conference/huddle room. Guide should include "how to" section, "what you can do in this room", troubleshooting; revise instructions as technology is updated
		Conference room technology trainings	Provide trainings so that users know how to operate and troubleshoot equipment; "what can we do in this room?"
		Neighborhood "super users"	Train "super users" in each neighborhood to serve as back up problem solvers
		Phone lines	VoIP lines should be provided in every conference/huddle/focus room
		Jabber number	Jabber number should be available in every conference/huddle/focus room with a screen
		Assistive listening device	Proved assistive listening devices for each sandwich and back up at security desk
		Assistive listening device signage	Create appropriate signage for assistive listening device
		Huddle/focus room computers, monitors and peripherals	Purchase and maintain appropriate equipment in huddle/focus rooms so that users can move seamlessly between workstations and focus/huddle rooms
?	**Conf/Focus/Huddle**	Furniture - conference rooms	Purchase and maintain furniture; evaluate every 3 years and replace as needed
		Ergonomic furniture- focus/huddle rooms	Provide ergonomic furniture; task chairs, keyboard trays
		Sit/Stand desks in select focus rooms	Provide sit/stand desks in 20% of focus rooms to provide ergonomic relief from fixed height workstation desks
		Workstation furniture	Purchase and maintain workstation furniture that is consistent with existing furniture; evaluate every 3 years and replace as needed
?	**Noise**	Noise abatement - Neighborhoods	Provide noise abatement in town centers; noise is leaking into surrounding work areas
		Noise abatement - Town Center	Add noise baffling in neighborhoods
		Noise abatement - Focus/huddle rooms	Additional noise proofing needed for focus/huddle rooms; noise is leaking into surrounding work areas
UCSF Police	**Mission Hall Security**	Turnstile	Install turnstile at entrance to 1st floor elevators; entry only granted to those with MH activated badge
		2nd floor suite door	Install code lock on 2nd floor suite door leading to town hall; 2nd floor suite is vulnerable to outside traffic. Code locks is needed to allow entry for seminars, etc.
		Temporary visitor badges	Provide temporary badges for visitors; daily and other designated times based on floor coordinator requests
		Wellness room badge for visitors	Provide temporary wellness room badge for visitors to be shared by floor coordinators
EH&S	**Ergonomics**	Ergonomic training	Provide ergonomic trainings for MH residents 2X / year
		Train the Trainer Program	Institute "train the trainer" program so that designated employees in each neighborhood can serve as instructor and resource for their unit

Appendix E: Summary of comments received from Mission Hall occupants in November/December 2015, with Task Force responses

Environment

Topic	Subtopic	Comment
Wayfinding	Room identification	Name focus/huddle rooms rather than use room numbers. Use whiteboards or something on each door to describe who's working in the room.
	Locating occupants	Can't find occupants in immediate areas and in other parts of the building
Acoustics	Acoustic privacy	Sound passes through walls and doors of focus/huddle/conference rooms. In workstation area, no privacy for patient calls and other confidential matters.
	Noise mitigation	For those occupants near kitchens and bathrooms, fix bathroom doors so they don't slam shut and are not audible from nearby cubicles; construct kitchen area floors with cushioned layer that mitigate noise, put door between edges of kitchen and adjacent work areas, erect signs in kitchen/common areas to ask people to speak in normal tones, not loudly, to minimize disruption to those working nearby
Open Work Spaces	Collaboration	Open workspaces are very collaborative and easy to meet as a group, but there is quite a bit of distraction. Spaces do not encourage collaboration, unless I stand up and yell over cubicles.
Acoustics	Noise impacts on productivity	Work environment is loud and distracting, and reduces productive and effective concentrated work. White noise/vents at work stations and focus rooms are noisy and cause headaches. Adjacent schedulers are noisy. Conversations should be held to minimum and conducted in low voices. Phone calls should not be placed on speakers. Cubicles should have high walls. Earplugs do not fully block out noise. Those with laptops can move to focus rooms, but those with desktop computers cannot. Those who must work at desks suffer reduced efficiency in noisy, distracting environment.
	Floor construction	Floors amplify the sound from walking.

Lighting	Lack of natural light (con)/ Bright (pro)	Lighting is unnatural and difficult to tolerate. Lighting causes headaches. Move those who are in MH more often closer to focus/huddle rooms with more natural light. Space is very bright and inviting and I really enjoy working here.
Privacy	Trash pickup	PHI shred bins are overflowing by the time they are emptied so people are placing boxes above with PHI information. Add more bins or have more pickups.

Technology

Technology	Lack of advanced technology	No particular advanced technology – computer often not connected and long walk to printers/scanners
Laptops	Laptops in huddle rooms	Provide laptops in huddle rooms so huddle rooms can be used effectively
	Laptops in focus rooms	Purchase laptops and docking stations for focus rooms

Private Offices and Workstations

Private offices	Lack of private space for physicians	Difficult for physicians to carry out work in open work space because it is noisy and difficult to speak with patients on phone. So more physicians are working from home on days/half days that they are not in clinic and not on service
	Shared private offices	Develop shared office approach to accommodate groups with more privacy and enhance cooperation of those who actually do collaborate
Occupant configuration	Clustering occupants by task	Collate people by task. Separate those on the phone most of the day from those who aren't.
Clinical research space	Converting conference rooms into research participant space	Consider remodeling one or two spaces on the first floor for use as research participant space, i.e. conference rooms opposite security desk along with small breakout area.
Workstations	Workstations against wall	Move workstations away from wall to eliminate dead-ends

Support Spaces

| Focus Rooms | Workspace use | Focus rooms are functionally unusable because they lack keyboard trays, monitors (height adjustable) and adjustable height work surfaces. Include ergonomic and adjustable chairs. Include docking stations for laptops. Some rooms should have "KVM Switches" (keyboard/video/mouse) which permits users to select which docking station is actively connecting to the input/output devices
Focus rooms are too loud because of vents and white noise. They are too small and feel claustrophobic, so I work in them for very short periods of time.
Equip more focus rooms with computers. It is rare when I take a call without also needing access to a computer. My phone calls can be disruptive to my colleagues. It takes time to set up a laptop so it isn't always an option when the phone rings. |
| | Supply of unassigned focus rooms | Very important to leave enough focus rooms unassigned so that those in workstations have access to focus rooms for confidential conversations. In future, if some focus rooms are converted to offices, how will focus rooms be managed? Who will mediate disputes between groups on allocation of focus rooms? If divisions need additional space for growth, how will that be handled? |

		Natural light	Some focus and huddle rooms with windows and better natural light are unused. Redistribute divisions to allow those which are in MH more often are near windows to increase ability to work in natural light.
Huddle Rooms		A/V equipment	Equip huddle rooms with A/V monitors. Five huddle rooms per floor is not enough. Equip more huddle rooms with computers.
Printers/Fax machines/document email		"Centralized" printing/fax/document email	Printing, faxing, document email functions are concentrated in "centralized" rooms, which are busy and occupants have to wait to use machines. Set up all machines so they can email documents. Decentralize print/fax/document email machines.
Kitchen		Placement/size	Kitchen placement/size causes a major chokepoint throughout the day, so people can't pass through (rather than produce the "casual interactions" which workspace designers seek.

Governance

Use of space	Underutilization of space and lack of respectful behavior (con) Well utilized (pro)	Space is vastly underutilized. Many work elsewhere. Culture is that people are not very respectful of those trying to work in carrels and have open conversations whenever and wherever they please. Many are having private sensitive conversations at their carrels. My area (4400's) is functioning and well utilized as is.
	Buffer zone	MH is working adequately for Pediatric Pulmonary group. Huddle Room is particularly useful and is used often. Personal space is working because nearest "neighbors" rarely occupy their space, leaving a buffer zone that protects us from noise pollution. If that space gets busy, it will not work well for us. As areas become busier, noise will be distracting and annoying. In the long run, current work areas may need to be divided into

		smaller work areas, separated by sound reducing walls.
Locations of groups	Based on jobs and frequency of use	Our clinical staff/faculty who have clinic one day a week are in the same location as ambulatory support staff who are on the phone all of the time (noisy, by nature of their job), while other clinical staff/faculty in other divisions have clinic daily and are rarely at their desks are located in quieter locations. Consider moving groups and distributing groups who have more or less time in MH to better group teams (e.g. put the ACC support team with a group who are rarely in MH).
Faxes	Fax machine arrangement and quantity	Wait time for fax to be sent with the shared fax is sometimes up to 45 minutes. This is not acceptable. Rearrange the location or divisions or install more fax machines.

Appendix F:
Open Plan Workspace Town Hall Presentation
February 5, 2016

UCSF
University of California
San Francisco

Open Plan Workspace
Town Hall

Friday February 5, 2016
Noon – 1:00 pm

Open Plan Workspace Town Hall

Agenda

- Introductions

- What is Open Plan Workspace Design?

- Why Open Plan Workspace Design?

- Task Force recommendations

- Conclusions and Next steps

- Q & A with panel

- Mission Hall Workplace Research Study

- Upcoming Major Building Projects with Open Plan Design

- Resources

UCSF

Open Plan Workspace Task Force Members

- *David Teitel*, Professor of Pediatrics (chair) *(MH 4/5)*
- *Michael Bade*, Associate Vice Chancellor, Capital Programs and Campus Architect
- *Ivy Chiao*, Senior Project Manager, UCSF Health Major Construction Projects
- *Margaret Damiano*, Associate Dean, Dean's Office, San Francisco General Hospital
- *Robert Hiatt*, Professor and Chair, Epidemiology and Biostatistics *(MH 2)*
- *Dixie Horning*, Interim Women's Health Administrative Director, UCSF Health, and Associate Chair, Obstetrics, Gynecology and Reproductive Sciences, and Department of History, Anthropology and Social Medicine *(MH 7)*
- *Janet Myers,* Associate Professor of Medicine *(MH 3)*
- *Karen Seth*, Practice Manager, Pediatric Brain Center *(MH 4/5)*
- *Jon Rueter*, Chief Administrative Officer, Clinical Translational Sciences Institute *(MH 6)*
- *Alan Venook*, Professor of Medical Oncology and Translational Research *(MH 6)*
- *Lori Yamauchi*, Associate Vice Chancellor, Campus Planning
- Ex-officio: *Daniel Lowenstein*, Executive Vice Chancellor and Provost
- Ex-officio: *Bruce Wintroub*, Vice Dean, School of Medicine

Open Plan Workspace Task Force

Charge

- Recommend workplace design and space governance strategies for Open Plan work environments in Mission Hall and in new and renovated buildings, based on the Mission Hall experience and informed by the Workplace Research Study.

Specific Areas (principles and policies)

- Space governance
- Configuration of desktop space (including offices, workstations and support spaces)
- Guidelines for allocation of desktop space
- Environmental principles
- Technology principles

What is Open Plan Workspace Design?

- Functional spaces in an open plan are the same as in the classic closed plan workspaces: private offices, open workstations, conference rooms, private shared spaces (focus, huddle), break areas, etc.

BUT
- No public corridors or enclosed suites (saves about 20% space)

Recommendations for Open Plan Workspace at UCSF

Governance

- Governance structure

  - local functional units – *decision making*

  - space administrative block committees – *oversight and adjudication*

  - building-wide governance committee – *oversight and adjudication*

- Building use protocols and procedures

- Zoning based on activity types or programmatic adjacencies

- Managing expansion and contraction of programs

- Governance in alignment with UCSF and School space principles and policies

Recommendations for Open Plan Workspace at UCSF

Desktop Spaces

- Local management of assignment of offices, workstations, and support spaces

- Regular reevaluation of assignments based on occupant utilization *(target average occupant utilization of 40%)*

- Private offices can be incorporated into the design

  - determined locally within policy guidelines and based upon functional utility (see report for specifics)

  - can be single (approx 70-75 square feet) or shared

- Ratios and placement of support spaces to workstations/offices

  - fewer Focus Rooms/more Huddle Rooms than designed in Mission Hall

Recommendations for Open Plan Workspace at UCSF

Environmental Features

- Ergonomics

- Privacy

- Way-finding

- Features of focus rooms/huddle rooms and breakout spaces

- Signage and displays

- Acoustics and sound transmission

- Flexibility

  - design and furnish focus rooms the same as private offices

Technology

- Enhanced and ongoing training for all technology

- Classrooms
  - install high quality microphone and video recording equipment

- Conference Rooms
  - enable multi-site, multi-disciplinary videoconferencing with ceiling microphones which support remote and local communications

- Focus/Huddle Rooms
  - equip with desktop computers/docking stations for prolonged work

- Copy/shared areas
  - study printing demand for shared copiers to determine printer count; include e-fax options

- Workstations
  - disable speaker phones and provide headsets for occupants

Conclusions & Recommendations

- Open Plan Workspace environments should be carefully designed and executed to meet the principles and criteria recommended by the task force.

- Open Plan environments should include private offices

- Assignment of private offices are based on functional needs for a private environment but does not mean a unique or dedicated environment.

- A formal governance structure for planning and operating the open plan environment should be established.

- Building-wide protocols and policies should be developed and promulgated.

- Establish a formal governance structure and communications program as soon as possible for Mission Hall.

- The Task Force recommends immediate action be taken to plan and implement improvements and enhancements to Mission Hall.

  - Budget for programming already approved by Leadership

  - Programming work to begin after acceptance of Task Force recommendations

  - Pursue multi-layered strategy where short-timeframe improvements are implemented while longer-timeframe improvements are designed, approved, and constructed

Next Steps and Timeline

Task Force

- Receive comments through 2/19, incorporate them into the report, and summarize them as appendix in final report

- Finalize report 2/29 (to be posted on space.ucsf.edu website)

- Submit to Space Development Committee and UCSF Space Committee for their acceptance at their March meetings

- Plan for succession – liaison group readily available to faculty/staff

See draft report at http://space.ucsf.edu/open-plan-workspace-task-force

Next Steps and Timeline

Everyone Else

- Review report & send comments to cristina.morrison@ucsf.edu through 2/19

- MH occupants: review functional units and start to develop structure within each to affect change

- Non-capital improvements to Mission Hall to begin as soon as possible after final report is approved

- Capital improvements *(section 5, p 24 of report)* to Mission Hall occur after planning and review process, cost estimates are finalized and funding for improvements is secured

See draft report at http://space.ucsf.edu/open-plan-workspace-task-force

Mission Hall Workplace Research Study

- Commissioned in 2014 at urging of faculty
- 270 self-identified UCSF personnel participated to date; on-line survey released in late January.
- Preliminary findings to date:
  - Occupant dissatisfaction with building's functionality, parking & transportation, increased commute, security
  - Well-being concerns, including ergonomics, privacy, cleanliness
  - Work effectiveness concerns, including mismatch between work functions and spaces, aural/visual distractions, technology
  - Engagement decrease and increases
  - Low building utilization (17% occupancy of workstations)
  - Benchmarked to peer group found less space per person and higher percentage of shared space in Mission Hall

Upcoming Major Building Projects

- Parnassus whole-building renovations of Clinical Sciences Building (CSB) and UC Hall (UCH) (desktop space/student housing)

- Mission Bay/Dogpatch new building projects

  – Mission Bay East Campus, Phase 1 (Block 33)

  – Precision Cancer Medicine Building (cancer outpatient building)

  – Mission Bay Neuroscience Research Building (Block 23A)

  – Psychiatry Building at 2130 Third Street

- New Research and Academic Building at Zuckerberg San Francisco General Hospital (ZSFGH)

Resources

http://space.ucsf.edu – information about all space projects including open plan workspace task force summary and workplace research study information.

Mission Hall online users guide:
missionhall.ucsf.edu

Join the Space Group on Chatter via MyAccess

Q&A Summary of this meeting will be available at http://space.ucsf.edu by February 19.

space.ucsf.edu

Appendix G:
Open Plan Workspace Town Hall Q&A Summary

Mission Hall Re-programming Questions

Q: Diana Block MH 4/5 Pediatrics: Expansion/contraction how functional units will deal with this. Functional units that are already established are at their expansion limit. Reorganizing 4/5 require that we look at the whole floor. What are the next steps?
A: M/H Occupancy rate has been very low (around 18%). There is a lot of capacity; we need to evaluate how space is being used. Use of space will be audited and block committees will work with functional units if a need is identified. The Functional units should look at how space is being used; find out if more capacity can be met by sharing, or other means first. The block committees have been established and will have the authority to re-assign space.

Q: How will architects make decisions about where offices will be located? When will these discussions take place with floor leadership?
A: Capital Programs will begin drafting proposals and estimates on what can be done and working with functional units so we get functional needs right.

Q: Ross Boeland in EPI/BIO: A lot of construction is expected in the future. Will the Mission Hall space be usable during the construction phase?
A: Capital Programs will plan carefully with the users in the building. We currently have a lot of focus rooms that will be converted to offices. There may be the need to construct more offices and a horizontal noise separation in town centers is a priority. The construction team who built the building is on standby, which is an advantage since they know the building. Campus leadership has already funded the re-programming process to improve the current work environment.

Q: Enclosing current cubicles: Does this mean walls are built that are not fully reaching the ceiling? Workstations will be used as workstations or potentially reframed into private offices.
A: No, this is not what we are planning. Focus rooms will be repurposed to private offices and when needed, additional offices may be constructed. Work stations will be vacated by folks moving into private offices.

Q: Must we change our current workspace? I love my cube. How will this differ from our current set-up?
A: Not necessarily. In collaboration with others in your neighborhood, you will have input into how the space you currently occupy will be configured.

Mission Hall Re-programming funding and timeline Questions

Q: When will these changes happen? What is the timeline?
A: A stable governance structure needs to be created; we are funded for the re-programming phase. Non capital measures can be implemented more immediately. Capital measures will take longer and a timeline and structure is currently being created. Information will be shared as soon as it is available to occupant groups of Mission Hall.

Q: Who pays for the improvements?

A: The sources of funding for the improvements are being identified. **Information will be shared as soon as it is available with the Mission Hall Block governance groups**. The funding for major construction or capital measures will be secured after cost estimates and budgets are developed. The proposals will go to the EVC&P office, who will work with the occupant programs and the architect, contractor, and Capital Programs. Together, all of these groups will determine the costs of the improvements, set budget, and prioritize the improvements, should all of the proposed improvements not be funded. The EVC&P will not be funding the improvements as the building is primarily occupied by SOM, Medical Center and Cancer Center programs.

Q: We have to keep the process moving rapidly. Is there a chance to have a fund available for folks to use for non-capital improvements with low cost and high success for staff and faculty morale?

A: A process is being created to define non-capital quick fixes, which will be funded by a 'Mission Hall Rapid Improvement Fund.' **More information about the use of these funds will be shared as soon as it is available.**

Q: Can we turn unused focus room into private rooms, especially for faculty? What is the timeline for doing this? (Leah McCann)

A: Eventually, yes, this is the goal. Focus room conversion to private offices will require some rethinking due to disabled access requirements which Focus Rooms in Mission Hall do not meet. A process is being created and will be shared with Mission Hall occupant groups, as well as Block governance committees and functional units. No changes should be made until a governance structure is in place. Ideally, the governance structure will be in place by end of March 2016. Re-programming efforts beginning with design may take place in late spring through summer with construction beginning in Fall 2016 and lasting 9-12 months. **More information and concrete details will be shared broadly as soon as they are finalized.**

Q: Can we request height adjustable desks without going through ergonomics? (Leah McCann)

A: Departments can order height adjustable desks for their staff as needed. It is not necessary to go through Ergonomics, nor will the Ergonomics program reimburse departments in Mission Hall for any costs incurred. At this time, the cost of these desks is the responsibility of the departments.

General Questions/Comments

Q: What are the future building projects?

A: Mission Bay future projects include: Block 33 Building (East Campus Phase 1), Precision Cancer Medicine, Neurosciences Research Building. Other building projects include the Psychiatry Building at 2130 Third Street, and the academic and research building at Zuckerberg San Francisco General Hospital (ZSFG). See space.ucsf.edu for information on some of these projects. As others come online, information will be added to the website. See also news about UCSF Housing.

Q: What will happen to parking?

A: New surface parking developed on the NW quadrant of Mission Bay campus, and on Lot 34 (across from hospital, adjacent to Block 33). More details will be shared as plans are finalized on space.ucsf.edu.

Q: Why is open space preferred over traditional work spaces?

A: UCSF is growing rapidly, in both research and clinical arenas, and the closed plan design is simply too inefficient and costly. UCSF is committed to creating work spaces that work for everyone, give us long term flexibility, are manageable and easy to adapt to changing work styles and provide opportunity for collocation. This includes a mix of private offices, shared spaces and work stations. In addition, the open plan workspace design removes the public corridor typical in older buildings, which saves about 20% space.

Q: There seems to be a discrepancy between research faculty and clinical faculty with the size of offices in existing spaces. How will this be addressed?

A: As we go forward, we need to reassess the space allocation for all private office space. Faculty who are overseeing research groups (especially those that are laboratory-based) tend to have very high occupancy rates and frequent meetings with team members, et al, so it may make sense to allow for slightly bigger offices that can accommodate this type of use. But we should move away from the oftentimes palatial offices that have been built in some research buildings in the past. New standards for offices should be developed and applied as renovations occur.

Q: Clarify how space decisions are generally made at UCSF.

A: Space decisions are primarily managed by departments/ORUs, schools, vice chancellors and the Medical Center, who are expected to ensure that their space is used. If units need additional space if they are using their existing space well, they submit their request to their departments to solve. If departments cannot solve the need, then they forward the request to the schools, vice chancellors or Medical Center to solve. If the schools, vice chancellors or Medical Center cannot solve the need, then the request is forwarded to the UCSF-wide Space Committee, who will determine if other schools, vice chancellors or the Medical Center can provide existing space to solve for the needs.

Decisions on constructing new space are made by the Chancellor, in consultation with campus leadership. The space needs to be solved with new space must be assessed, options identified and evaluated, and the physical and financial feasibility of the project evaluated in order to inform the decision to construct space. A similar process is followed to inform decisions on leasing new space, but depending on the amount of space to be leased, decisions may be made at the department or school/vice chancellor level.

Q: How does a department request space or to be included in space options for future plans?

A: Space decisions are primarily managed by departments/ORUs, schools, vice chancellors and the Medical Center, who are expected to ensure that their space is used. If departments need additional space they should determine if their existing space can meet the needs. If departments cannot solve the need, then they forward the request to the schools, vice chancellors or Medical Center to solve. If the schools, vice chancellors or Medical Center cannot solve the need, then the request is forwarded to the UCSF-wide Space Committee, who will determine if other schools, vice chancellors or the Medical Center can provide existing space to solve for the needs.

Q: Education director of UCSF Simulation Center. Want a satellite site of simulation center at MB to accommodate learners at both sites. Parnassus site is at capacity.
A: This request will be added to the list of additional functions that are now needed at Mission Bay given the expansion of clinical programs.

Q: Is Open Plan workspace fundamentally flawed to our academic environment?
A: The deficiencies in MH are not generic; Open Plan can be designed to accommodate various needs. If our academic environment requires private offices, then Open Plan design can provide them. The primary difference between Open Plan design and our existing academic buildings is the enclosed suites that close off access and segregate units. The problem with our existing academic buildings is how inefficiently they are in usage of space and lack of flexibility to accommodate growth and contraction. The costs to renovate older buildings are very high. The open plan concept still allows for the creation of functional units to manage space and allows us to grow, expand and better utilize our space into the future.

Perkins+Will, a private firm, has been retained and is working with us on an 8 year Workplace Research Study across all of our open plan design buildings to continually evaluate how we're doing with these changes.

Q: CAPS: trying to reserve conference rooms or classrooms for workshops – really difficult. Will more conference rooms for 40 or more folks within buildings be considered?
A: There are a variety of conference rooms available at major campus sites, including Parnassus and Mission Bay. The 25Live scheduling system and the UCSF Conference Center both offer rooms of a variety of sizes to accommodate large groups, workshops and other multi-day events. The classrooms on 25Live always have an educational priority. Rooms scheduled within floors and sandwiches at Mission Hall are scheduled directly with the Floor Coordinators, or other systems. Improvements in 'way-finding' or how conference rooms are used and booked (including when reservations are cancelled) will help make use of conference rooms more efficient.

Comment: Before the building was built there were a lot of comments made that address a lot of these issues. It would be helpful to revisit those as we begin planning the reprogramming.

Comment: Why in 2016, a year after the companies who have tried it are all backtracking having realized that open work spaces don't work, is UCSF still doing this? Open work spaces reduce efficiencies and drive employees crazy! I lost my office several years ago thanks to UC's inability to manage space, and I have not been able to deliver the same caliber of work ever since, not to mention that my job satisfaction has plummeted to depths heretofore unknown. Please stop doing this! We need doors!

http://www.huffingtonpost.com/2015/02/12/open-offices-changing-to-include-private-space_n_6669666.html

Appendix H:
Comments and Feedback to draft report received through February 19, 2016

Open Plan Workspace Task Force draft recommendations feedback and comments

Design, General Process and design ideas for future projects

Feedback/Comment	Response or where to find in report
The one thing that seems to be missing to me is the need to ensure that future building designs/renovations include input and sign-off by the intended end users/occupants is included for future buildings. We seem to be addressing the deficiencies of the Mission Hall building rather than focusing/prioritizing adjustments to the design process. As is stated throughout, many future occupants pointed out the critical need for private offices for MH but were ignored and now were are fixing this but we aren't stating how this can be avoided in the future. Perhaps in 5-10 years future groups of building occupants want no private offices, are ignored and end up with a building that doesn't meet their needs. This is want we need to avoid.	Capital Programs and Campus Planning, along with leadership in the Schools are aware of this and are implementing processes into current major project design to address future building design input. The groups are ensuring the process is clearly outlined at the beginning of each project, expectations are set clearly and outcomes/action items are shared. The teams are also working closely with committee members to ensure they have the tools to share information broadly with their representative groups.
First, it is unclear how this report is aligned with or will align with the results of the current (ongoing) workspace survey. Is the current survey part of the Mission Hall Workplace Research Study? It would be helpful if the relationship between these two work streams was mapped out clearly for everyone. Will this report be updated with the results of the current survey data collection? Building user engagement: there is limited mention of how the users were engaged in the planning process. This was a major concern and recommendations do not cover this well. How should have users been engaged? What would have been the ideal process for this engagement? What are the lessons learned? Why was a use survey of the previous building not undertaken (ie at 50 Beale Street) before developing the plan? If the project planners ran out of time I assume that this means that they did not value that part of the process. More information is needed in this report. While I understand this survey and report is geared toward workspace challenges, part of the move to MH that was a major change for many is the location. This location is far from reasonable public transportation (ie BART) and there were promises of improvements to the Muni T line, bicycle sharing, even a ferry terminal for Mission Bay. None have occurred. The location of this building and lack of access and parking has a large part in the reason why the space as a whole is underutilized. I also think that UCSF should have asked occupants how they wished to be supported or receive information on commute options, traffic, parking, in particular given the number of SF Giants day games. How did UCSF leadership foresee or plan on supporting occupants during this major transition? What have other departments done? For example, what are employees of UCSF Medical Center in Mission Bay instructed to do regarding parking? Are they offered discounted parking passes? Task Force composition: Would be good to include in the report how the task force members were chosen. Did the MH occupants have an opportunity to choose their task force member? The only detail is that one person was chosen from each floor of MH.	The current survey is a part of the Workplace Research Study. The survey results will be shared with the Mission Hall and broader UCSF community. They will also be used in future open plan space development. The Mission Hall Stakeholder process began in 2011 with stakeholders representing all the groups going into Mission Hall. In hindsight, the project team could have initiated a more robust program to incorporate all users; we learned from this process and are working to implement in future building processes a robust communications and change management program. A website was created in Fall 2013 to provide information not only to Mission Hall occupants, but to the entire UCSF community regarding major space projects. This website is an ongoing resource for all at UCSF and we continually work to provide updated information. In addition, Mission Hall occupant groups were offered presentations, trainings and other resources in the year leading up to the moves. There were a lot of gaps in communications, the impacts of commuters was very stressful and we anticipate having a more aligned approach as Mission Bay continues to grow in the next 3-6 years. Currently, there is parking available both in the Third Street garage, as well as the surface lot. The Medical Center handles parking in the same manner as the campus, employees may purchase a monthly parking permit if they are available. Information is available about the task force on space.ucsf.edu/open-plan-workspace-task-force.
In reading this report, I was astonished to read, on page 25, that "The Task Force accepts the premise that UCSF intends to apply the open plan design to future desktop environments, …" Based on the data in the report, most notably that Mission Hall as a 16% occupancy, it is time for the campus leadership to accept the reality that the "Mission Hall experiment" has been an abject failure. Indeed, based on faculty comments at the Senate meeting – particularly the strong statement that "Mission Hall had destroyed collaborative relationships." Indeed, the couple times I have been there, I was struck at how empty the place was. As someone who runs a research center that places a high value on stimulating collaborative work, I know how important having people in the office is to promoting that collaboration. An empty office will not do that. We have old fashioned high cubicles for our fellows and staff and even there, some complain about noise and lack of privacy. For people who are expected to think and be individually creative providing them some personal space is important. The message that the administration's refusal to admit failure sends to the faculty and staff is that they simply do not care about making UCSF a productive and supportive work environment. It also	Offline communications with Dr. Glantz around emeritus faculty.

sends the message that people not doing laboratory work – including both clinicians and non-laboratory researchers – as second class citizens at UCSF who do not warrant the same large capital investments that the administration devotes to laboratory researchers. In listening to the discussion over "activity based workspace" (ABW) – which should really be called "cheap workspace" because people's actual activities have not been taken into account, I hear many glib comments about how UCSF is being "innovative" and following the leads of startups and tech. It is important to keep in mind that there are some important differences between the kind of work and people at UCSF vs. a startup: • People working at startups are hoping to get rich, not provide teaching, research and public service to make life better for the people of California. • People working at startups are highly compensated; people at UCSF are poorly compensated (and getting more poorly compensated as the retirement system continue to be degraded). • Startups and tech often provide other perks that would be unthinkable at UC: free food, free transportation, free recreation. • People working at startups are often working in large groups on a single project. • People at startups are not routinely dealing with sensitive personal information, be it about students or patients. • Quiet reflection is not an important element of work in startups. • Startups do not place a premium on long term commitments or loyalty. Indeed, those differences are why different kinds of people come to work at UCSF. While many of the recommendations in the report are reasonable in terms of ensuring that offices are fully utilized (such as only allowing one full time office and planning for office sharing when appropriate), the fact that these arrangements are treated as exceptions to the general approach of open plan offices, does not provide confidence that the true lessons of the failure of Mission Hall have been learned. The decision to offer such dysfunctional workspace is clearly a response to fiscal pressures. It may be that UCSF has simply grown beyond a sustainable size and that the time has come to make some hard decisions about what activities we can support at a decent level and not do other things. While I am lucky enough to have a very nice office now, complete with a small conference table that is heavily used, I have had many offices over the years at UCSF, including some very small ones and one that was a repurposed closet literally). The stakes here are high. One aspect of universities people complain about is that there is a lot of inertia; things are hard to change. But in the current environment of budget cuts inertia has helped to maintain UCSF. Developing a reputation as being a place that does not even provide decent offices, together with low salaries and a poor pension system, will also be hard to recover from. Indeed, one junior faculty member I recently helped recruit who is currently housed at Laurel Heights told me that she would not have come to work here without a decent office. Continuing the accept that abject failure and start listening to the faculty and staff is reminiscent of the disastrous merger with Stanford. The faculty (and staff) have made it clear that they would accept small, and when appropriate, shared offices. That request should be prioritized and honored.	
We understand that under the Open Space design, security is based on a floor-by-floor basis. In the new buildings, will there be any option of using staircases to get to and from our offices, rather than elevators? For those of us who sit at our desks for 9-10 hours per day, stairs play an important role in our exercise and health. And for women who work late, open staircases (as opposed to both elevators and closed stairwells) are really important in feeling safe as we're getting to and from our work sites. If they need to be secure, a central staircase with glass walls or glass entryways to the floors would be better than the elevator-focused design in Mission Hall.	Considerations will be made in future building design to incorporate, when possible, an open staircase, however, the amount of real estate this type of staircase takes up may make it prohibitive in the absence of enclosed suites.
Include UCSF Ergonomics & Human Factors early in design decisions and programming phases, and with early conversations with end users and other stakeholders to ensure ergonomics principles and requirements are *understood* and included in all work environments. Mockups and user trial/input sessions on furniture and ergonomics issues should be guided so that users know what and how to evaluate different features. Consult with UCSF Ergonomics & Human Factors when creating these sessions. During the previous Mission Hall mockups, ergonomics was involved too late and this resulted in confusion and frustration. Improve communications related to ergonomics before/during/after moves. Many users were unaware of the user guide with information about ergonomics. Streamlined processes should be developed so that users can sit down at any workstation, spend a few minutes adjusting this, and then be ready to work comfortably. Work with UCSF Ergonomics & Human Factors Program re. frequency of ergonomics trainings (1-2 per year) and train-the-trainer program designed to train designated employees in each neighborhood to serve as instructor and resource for their unit. New employees should take the ergonomics training class online as soon as possible and should be provided with access to the building user guide with more information about ergonomics. The building user guide should be updated to reflect changes in workstation design and processes. Ensure adjustment instructions for how to adjust electric-height adjustable desks and how to adjust chairs are readily available to occupants. Consider placing lockers in the building to reduce the need for users to keep items in focus, huddle, or hoteling spaces for extended amounts of time. Building Facilities Manager should be trained in available ergonomics resources and information/users guide in order to	Pg. 14-15 ergonomics

facilitate sharing this information with occupants. Ideally this person would participate in ergonomics train the trainer program. All workstations should be as standardized with the fully-adjustable furniture that meet ergonomics requirements in order to provide maximum flexibility and best fit for most users. Building occupants should determine methods to allow occupants with different equipment and/or environmental needs to share the same office and should develop processes to manage this. Larger offices may be needed to accommodate the need for two different chairs, keyboard tray, etc. Efforts are being made at UCSF and UC-wide for favorable pricing on electric height-adjustable desks that meet UCSF and UC requirements for these desks. I am the chair for the UC-wide committee looking into this and am on the new Comprehensive Furniture group looking at this for UCSF. With increased use, energy efficiency will be important and there are energy efficient versions available that meet our requirements.	
Governance	
Allow more localized space control – I am part of CAPS, which is a part of the 2/3 Mission Hall sandwich group. But our needs may be very different from those located in other parts of the 3rd floor let alone the second floor. For instance, our space has a very high percentage of faculty who would likely benefit from private office space.	pg. 11 and 18
Governance: I know this sounds Nazi-ish, but without consequences for one's disregard for the operating principles, we'll never govern the floors effectively. The kitchen is the biggest example. The appliances and general cleanliness of the sink and whole countertop area are probably the #1 complaint I hear about. It seems some leaders need to be empowered to monitor the kitchens and Governance needs to have a course of action for people who don't follow rules (for example: Step 1: email to their superior Step 2: fines, or Step 3: assigned clean up duty for a month).	Pg. 19 as part of governance/protocols/procedures. More thorough and ongoing training for using open space may be provided in future buildings. Remind folks on every floor about kitchen and shared space etiquette.
I don't see how the Governance bodies for each floor can allocate office space in a fair manner, even if using the brief criteria outlined by the Work Group. It seems that only the powerful will prevail.	Pg. 11 and 18
Faculty continues to request the importance of having an office with a door and that they don't mind sharing their office with a few colleagues in it.	pg. 11
MH occupants and their representative need to have formal input, and be listened to, from the beginning to the end of the planning, design and implementation process. The utilization of workstations and focus rooms varies a lot by area/group. For my group's area I would put the %s at more like 75% for workstations and 50% for Focus rooms. It doesn't make sense to plan without accurate info on utilization, which the gross averages don't provide. I'm sure its higher on other 2nd floor areas than the MH averages state as well. I'm concerned accuracy of the accuracy of these survey numbers. How were they arrived at? Other 2nd floor workstation areas that are clearly more heavily used seem to be the epi admin area, Bob Hiatts' area and the IT group area. Most (probably not all) Huddle rooms are being used on a regular basis and are serving their purpose (based on my informal reconnaissance). Don't do anything that makes our situation worse. For example, do not: o Fail to take actual utilization patterns into account. o Convert ANY windowed Focus rooms to offices. o Convert ANY Huddle rooms that are serving their purpose to offices. o Leave some areas without adequate Focus and Huddle rooms thus increasing traffic flow and noise disruption in areas where these rooms remain. E.g. on page 5 it states "SOME Focus rooms should remain available by occupants in workstations..." Too vague. Maintaining access in each area of 2nd floor to nearby desirable Focus and Huddle rooms needs to be a key factor in design decisions. An overall ratio of WS to F and H rooms is not all that useful a design guideline. Local input and control of decisions on changes is critical. Breakout areas should be converted to Huddle rooms, not offices. Dead-end circulation in workstation rows contributes to privacy. Why should it be eliminated? All remaining Focus rooms should be properly equipped e.g. MacMinis as has been done on 2nd/3rd floors. Don't eliminate Focus rooms that would be better utilized if they were properly equipped. Huddle rooms and offices around the Town Center can serve to isolate the open WS areas from Town Center noise. Copy areas need to be isolated acoustically, not only because of machine noise but because of the spirited (i.e. loud) conversations that naturally tend to occur around them.	Pgs. 10-15 Pg. 17 technology

As focus rooms will be turned into offices, I would hope that it is stated that doors should be kept closed. As part of the administrative staff, I am at my desk 8 hours a day. Focus rooms are not ideal for offices (as you know) – they are small, no window, and what ensues is that people are using them as offices and keeping doors open. This is disruptive to those of us who are at desks situated just 3 feet outside of the focus room. Or administrative cubicles should be moved to inner areas where they are not right outside a focus room. Speaker phones should be disabled in open areas, people (mostly faculty) are using them irregardless of their neighbors.	Pg. 11-12 and training on using shared spaces
Proposed amendment to current language on private offices: Current: Private office space need: The addition of private offices should be considered to address specific functional needs of many faculty and staff whose jobs require handling of confidential and sensitive data or cases. Recommended: Private office space need: The addition of private offices should be considered to address specific functional needs of many faculty and staff whose jobs require handling of confidential and sensitive data or cases; a need for quiet, distraction-free space for writing with access to their own files and computers; conference calls for which access to files and other materials is needed; and frequent one-on-one supervision and mentoring meetings.	Pg. 10-12
The idea of re-engineering workspace to assure more privacy is a good one. I do not see how that is feasible, cost wise. For my space, it would be a significant re-do of the desk space—as there is no alternative currently to having my monitor not facing the public area.	Pg. 15
Having re-read the draft, I am concerned about the line "As a rule, Focus Rooms with windows should not be converted to private offices," unless some accommodation is made for those neighborhoods that only have windowed focus rooms. In my neighborhood, if restrictions were placed on converting focus rooms with windows, then we would not be able to convert any, and we would need a new allocation of rooms which we could	Pg. 10
Allow private offices to be at the windows – this will help people who are doing concentrative work all day in their offices; the non- private office focus rooms are likely to be used for briefer periods of time where being in an interior space is less likely to be claustrophobic.	Pg. 10
I wanted to send you some comments about my experience of the work space at Mission Hall. First, I've been experiencing an ergonomic problem with my work space. I'm unable to access my keyboard without turning it slightly to the right because, otherwise, my left elbow always hits the side of my desk and is unable to rest my chair's armrest. Second, I think there is very little usable space to actually write notes and do non-computer related work at my desk in its current configuration. When I use the space to the right of my computer, I notice that I'm easily distracted by the person beside me because I'm much closer to them and can see and hear them working more than I would like. In addition, when I try to use the work space directly to my left, my feet inadvertently hit my cubicle wall since the desk is so narrow.	Solutions include having keyboard tray re-positioned and reconfigure layout of work space so there is more writing space. Work with supervisor.
I am new to the building and have worked in open floor plan environments for decades. My first comment is that I think that the energy going into this work must be proportional to the angst that the move has generated, but I like the space I think it's highly functional. I am fearful of the push to private offices because I suspect we will lose a lot of the natural light that makes the building so appealing. If private offices are to be added – I think they should be in the core of the building (not at the windows) and should be limited to the smallest number of people possible (full professors?). My main concern is sound - compared to other cube spaces I have worked in, this environment is very loud and I suspect much could be done to reduce noise transmission in the open plan.	pg. 10
I wanted to add to Roberta's concern about what may happen when MH is more full. My area is usually quite empty, and our focus & huddle rooms are often used by people who are not housed in our neighborhood. I'm totally fine with that because there are usually additional rooms available if I need one. But I'm a little concerned that if more neighborhoods convert focus rooms into dedicated spaces and private offices, it will likely mean that all neighborhoods will do so, to "protect" their space. I think the governance issue becomes important for those neighborhoods that are shared (e.g. ours is mostly hospitalist but also gen peds).	Pg. 18
Please glass in the entire kitchen area from top to bottom and include doors to the areas that connect to the hall. This will not stop all of the noise on the floors but would help immensely. Two conference rooms let out into the kitchen area as well and because of the design and appearance of the kitchen those leaving the rooms think it should be party time for the ½ hour or so it takes people to say "goodbye". Or people take breaks in that area during meetings.	Pg. 14-15

I agree that electric height-adjustable desk should be incorporated as a standard furnishing in open plan workspaces. They should be available to users in all computer workstations, including open plan areas, shared offices, private offices, and hoteling work spaces. This will allow any user using these spaces to easily adjust the desk to work safely. Desks need to meet UCSF ergonomics requirements for height-adjustable work surfaces. Re. assignment of private offices based on job tasks: Employees may disagree with decisions about their eligibility for private offices. You may want to provide guidelines to help groups interpret "continuous" use, "frequent" use, and "high emotional and intellectual stress". Alternatively, you may wish to create a process where employees can dispute a decision made by local governance. Disability Management Services and HR may be helpful partners on this. Will noise cancellation systems be adjusted to differ between noisier and quieter groups? Some employees may want to be near walls for more privacy/less distraction and they may not mind being placed near walls and dead-end circulation. Focus and Hotel rooms should have height-adjustable desks and fully-adjustable chairs that meet UCSF ergonomics requirements. Other furniture and accessories in these spaces should be evaluated to ensure compliance with ergonomics (I.e storage height and depth, monitor arms, lighting, orientation of computer/monitor screen, etc). Conference room furniture should be improved to allow safe work postures during long work periods and meet ergonomics recommendations for these spaces. Ergonomics and IT should collaborate with end user groups on this. If personal printers are used in workspaces, they should be positioned so as not to interfere with ergonomics and desk height adjustment. Guidelines can be provided if needed so that users can determine appropriate placement. Headsets should be provided to employees to use with VOIP telephones and in open office workstations. Ensure noise and lighting is designed to support sitting and standing in open plan environments. Noise will carry differently when employees stand; noise may increase if telephone calls are made during standing work or in environments where more frequent calls are made. Workstations must be oriented so that direct and indirect glare do not cause visual disturbance when standing or sitting. Because users prefer not to sit with their backs to the entrances of their workstations, careful consideration needs to be placed on workstation orientation in the planning stages to allow for safe, appropriate monitor positioning and usable work area within the work space. Minimum UCSF ergonomics requirements for desk size requirements need to be maintained. Use adjustable panels that attach to the sides and backs of adjustable desks, ideally with sound dampening/absorptive features. Electric height-adjustable desks and fully adjustable task chairs should be used in Focus rooms.	Pg. 14-15 Environmental Features, including Noise, Ergonomics Pg. 10-13 office assignment
I have fellows and staff in and out of my office all day but can foresee doing those discussions in a huddle room. When I'm on campus, I often will get one of the faculty study offices in the library so I don't have to go back and forth to my office at Laurel Heights. Those are probably 60-70square feet. They are fine for grant and paper writing. So agreed that we may not all need offices like my current one that can handle discussions with other faculty, fellows, and staff, but most of us do need a place to, among other things, generate the indirect costs for the university, something like the faculty study offices in the library.	Pg. 10-13
1 Usage data about each Town Center floor configuration should be shared. I suspect floors 2/3 have higher usage and might need to be handled differently. With the current assignments, we're out of space on the 3rd floor, while floors 4-7 aren't nearly as utilized. 2) 2) Again, I would hope the task force would learn that indeed, one size does not fit all. We have to investigate the different functions of the groups who inhabit each floor, not the building as a whole. We are just too diverse. 3) Food smells have also become an issue for some people. And perfume continues to be an issue. 4) Some lounge spaces are hardly used and could be converted to offices (though I know the Chancellor is not on board with any capital improvements). 5) Repositioning work monitors will be costly because in many cases you would have to move the storage units and replace with solid dividers. The report is right that most faculty and staff HATE being approached from behind. And work privacy suffers (for me, I'm always working on HR and budget issues so have to turn my screen off EVERY time I leave my cube). 6) One Achilles heel of the report is that faculty have all been assigned window spaces on our floor. So the option of creating offices from workspaces for faculty seems to be a non-starter (given the excellent priority on natural lighting for others). 7) Some real thought needs to go into office assignments. For example, functionally, I'm here 100%, I mostly work on budgets and HR issues and have more need for private phone conversations. My boss is here 60% of the time, does a lot of conference calls, but doesn't do a lot of privacy-type work. Because of space/office limitations, if I get priority over him for an office, what could that do to our working relationship? Academia is still hierarchical.	Pg. 10-13 and ongoing training for open space environments Pg. 14-15
When I filled out my survey, I don't think it captured my concern about working more efficiently/collaboratively. People are not coming to work; they are working from home. So it is very difficult to bring teams together—as opposed to 50 Beale Street (where everyone came to work). When the majority of faculty don't come to work or work from the hospital, it is very hard to be motivated to be present.	

One of the most common complaints I've heard from faculty regarding their ability to utilize their workspaces at the Mission Hall building is that the MH building is simply too far from the MB hospitals to allow faculty to get to / from their workstations to / from the MB hospitals in a timely manner. That didn't seem to be addressed in the report, but hopefully any new construction would include spaces close to or in the hospitals for clinically active faculty. Beyond that, as noted in the report, we need spaces that allow for privacy in the HIPAA environment. Finally, lack of offices for top level faculty make it even more difficult to recruit (especially with upcoming reductions in retirement benefits, coupled with the fact that salaries are not necessarily competitive here).	The proximity of Mission Hall to the Mission Bay Hospitals is the closest it could be. While this does pose a problem for busy clinicians as they have to cross a street, UCSF is located in an urban environment. The Parnassus site has similar constraints, in addition to the space ceiling which are parameters Capital Programs, Campus Planning and leadership must take into consideration when planning new buildings or major renovations. The fact that we are able to continue to grow at Mission Bay in very close proximity to research and patient care is very helpful. We will continue to work with the Medical Center to find ways to improve access for clinicians in areas adjacent to clinics and patient care.
I appreciate the hard work of the Open Plan Workspace Task Force. I also appreciate the ECVP's attentiveness to faculty concerns about the work environment at Mission Hall. However, I'm concerned that delegating the responsibility for diagnosing needs and finding solutions to each functional unit may not result in tangible improvements for the faculty at Mission Hall. Each functional unit is being tasked to decide how to reconfigure our spaces, but as I understand it, there is no central funding to pay for changes. As a result, some functional units- perhaps those with more funding, or a larger or more vocal faculty group- could work with the architectural design team to improve their environments. Others will not be undertaking any structural changes (including the 3rd floor Bixby functional unit, despite the fact that we are seated right next to the large conference room/lunch/lounge area, and are subject to relatively greater ambient noise compared to some other units). If some functional units are able to take up the university's offer to make structural changes, and others are not, this would result in inequities across units and floors in the building, adding to the inequities faculty are already experiencing in the quality of our work environment relative to that of our peers in other parts of the campus. The proposed solution is to set aside some of the focus rooms (the ones without windows) for some of the faculty and staff who require private office space. Yet focus rooms, as the report documents, are under-utilized because faculty and staff find them to be too claustrophobic, dark and stuffy for prolonged work (those with windows are more used). One can't adjust air flow or temperature. One can't actually work in them and meet with one or two others, which is why the huddle rooms are in demand. Moreover, given that this is our experience with the focus rooms as they are furnished now, it's hard to see how they could be organized to also include a cabinet for books and the few things that faculty need to function. I am still hoping that a sustainable and equitable solution can be found that will draw the faculty back to Mission Bay and enable a productive environment on campus.	Pg. 10-14 and needs clarity on next steps/implementation
I think the report gives inadequate attention to commute times and the promises that were made: i.e. Bike Share before we arrive...before the hospital arrived; food venue 2 years after the fact.	Part of lessons learned which will be addressed in future building projects – engage with campus service providers sooner and have implementation plans ready 6 months prior to moving in (shuttle service, retail). Ensure leadership meets early with staff and faculty moving to a new campus to clarify the impact of change.
Technology	
The report recommends purchase of laptops and docking stations for focus and huddle rooms. We considered that solution while preparing for our move to Mission Hall and rejected it for the following reasons: 1) Laptops are never ergonomically correct, 2) not everyone has a laptop, 3) Docking stations are machine and model specific, 4) Transitioning to a laptop does not give you access to material you might need on a call, which might be spur of the moment. Our solution, which I think is much better, is to equip rooms with inexpensive and small desktop computers (we used Mac Minis), large screen monitors and keyboards. Then configure the machines so that you can log back in to your own desktop. Then when you transition to a focus or huddle room and log in, it just looks like your desktop.	Pg. 16-19 Technology and governance

To David Teitel: I read with considerable interest the Task Force Recommendations and watched the Open Plan Workspace Town Hall. As the person responsible for managing over 90 classroom and learning spaces at UCSF, and the person who helped design the touch panel interface found in each of those rooms, I would love to talk to the committee about their concerns. I think there is a lot of misunderstanding and misinformation about what is available in Mission Hall and who manages those resources. I would like to help clarify some of them.

While nothing is ever perfect and all systems can be improved, my team and I have worked very hard to simplify and amplify the technology in general use tclassrooms. When I arrived nearly five years ago, I counted FOURTEEN different interfaces on campus used to control AV. We are now down to TWO. Unfortunately for our users, the Medical Center used a variation on our system to build out the video conference rooms on the MH department floors and MB hospital, neither of which are managed or supported by Educational Technology Services, a division of Student Academic Affairs, whose mission is to support academic programs in the four schools and graduate programs at UCSF.

When department conference rooms and the hospital were being designed, Telehealth support was in a state of flux, so we lent our experience and expertise with VC systems to help facilitate the strict budget and timelines required by campus planning. We were also under a mandate to provide classrooms for several programs moving to Mission Hall, particularly EPI/BIO, Global Health, and, to a lesser extent, CTSI. The University engaged leadership from each of these units in the planning process. We also worked with OBGYN and PEDS, because they had academic programs in Mission Hall as well. We continue to work with EPI to accommodate some of their special needs.

In August and September, we helped ITFS and Telehealth by providing training in the use of the conference rooms on MH floors 2- 7 by working with the floor reps and Cristina Morrison. Again, we are not the entity that supports those rooms but we volunteered to do training because we felt it was important to help. We also got money from IT to upgrade the code in all rooms and to improve the audio. Actually, Liz and I anticipated some of this confusion back in August 2014 and suggested that ETS would consider managing all the conference rooms in MH *if* new staff were hired by ITFS and/or the Medical Center. They chose to do it themselves.

I felt it was important to tell our story because so many accusations are being thrown around so loosely. Is the Task Force referring to ETS or IT or Telehealth when it makes recommendation on technology? Are the problems they describe in classrooms just minor tweaks or major failings? What do users want in their conference rooms that they don't have now? Are the technology issues anecdotal, and if so, what portion of our users do they represent? To use a small example, one of the recommendations is to provide audio and video recording in the classrooms, yet there is already high quality recording capabilities in 1400, 1401, 1402, 1405, 1406, 1407 and 2103 … and it is automated! What are the unique requirements for epi and bio that we haven't been addressed already?

I understand the overall frustration of MH residents who in many cases came from very nice spaces where they "owned" and controlled rooms that weren't subject to the same restraints they now face in using shared spaces. But we have done everything we can to help make that transition a smooth one by keeping our technicians available by phone (4-HELP) and stationing at least one tech in MH 1500 for in-person support. I also understand the frustration of persons from the Hospital who view these spaces as their own, but don't understand the reservation policy that assigns priority to numbered academic courses. I also fear Campus Planning has done ETS a disservice by constantly referring to the 1st and 2nd fl. rooms we manage as a mini conference center. It is not, even though we have modified our policies to accommodate conference-like events in rooms 2100 and 2103.

Please excuse the long-winded apologia, the purpose of which is to provide some context before saying the following: ETS/SAA is more than happy to listen to the needs of MH residents and classroom users so we can make changes that satisfy their needs … consistent with standards that work well in all other University classrooms. You needn't wait to do this. ETS has the resources to tweak systems now and make other enhancements as soon as this summer. Training can begin tomorrow or next week or next month … whenever it is needed.

I hope this background provides an explanation of how we got to where we are and demonstrates our willingness to go further. Please do not hesitate to call on me to help resolve any of these issues.

Response from David Teitel: Thanks so much for your note, John. I really appreciate it, and your offer to meet. There are important problems with several aspects of the installed systems and the structure of some of the rooms, most of which were beyond everyone's control at UCSF, so the report should not be considered an indictment of anyone. And it's important to note that the availability and quality of videoconferencing here at Mission Bay far exceeds what we had at Parnassus. That being said, it does till fall short of our needs, particularly with regard to diagnostic quality image sharing, and is not at all intuitive. I work with the telehealth people (Linda Branagan's group) and Cisco on at least a weekly basis and we still don't have everything working as we need it, nor are we very close as yet. And for whatever reason, the rooms are very hard to use. We have an IT person at our weekly multicenter conference in MH5700 (Matt McFettridge or Jen Nourse, who is one of our IT people) and we still have significant problems come up each week, both with the Creston interface and the bridge. And I am a very tech savvy person and I still have a terrible time working out how to properly use the interface. It is definitely not intuitive to me. So issues remain but I'm hopeful that, with everyone's support, we will get things working properly.

To answer your specific questions:

Is the Task Force referring to ETS or IT or Telehealth when it makes recommendation on technology? There are problems that each group needs to deal with. Above I described issues both of telehealth and IT, but I only work on the 4th and 5th floors so my issues have nothing to do with ETS. However, we have had complaints that there are problems with the audio in the conference rooms on the south part of the first floor (hearing outside people and and outside people hearing them on conference bridges) and with the structure of the classrooms (wide but not deep, so it's hard to use the two monitors and interact with people) and well as the difficulty using the equipment.

Are the problems they describe in classrooms just minor tweaks or major failings? I think you'd have to ask that of the people who use them. I'm not sure whether video capture, for example, is implemented as it is up at Parnassus in the large classrooms, and how to set it up, if so. I haven't seen cameras in the classrooms but I'm not there often, nor do I teach there, so I haven't looked. And as I mentioned, several people think that the shape of the rooms is not good for teaching when they are joined. So, I really don't know how to answer your question but we certainly can try to get those who use the rooms to respond.

What do users want in their conference rooms that they don't have now? That is in the report. We would like uniform, intuitive equipment that works reliably, the ability to transmit images at an adequate resolution at a minimum of 15 fps, preferably 30 fps, for diagnostic level viewing, and rapid support when needed.

Are the technology issues anecdotal, and if so, what portion of our users do they represent? Everything is anecdotal - we don't have a quantitative system whereby people rate the conference capabilities at the end of each conference (it would be interesting, though) but I can safely say, from meeting with the survey people, from talking to many people in Mission Hall, and from working with the Telehealth and IT people, that the issues are universal. I have heard no-one say that the conference rooms are problem-free.

	What are the unique requirements for epi and bio that we haven't been addressed already? I am not part of that group - perhaps you can ask Bob Hiatt, who is on our task force and runs the program. With all that in mind, I'd be delighted to meet with you, perhaps with our task force of the new liaison group that is being created, or in any other forum. And if we do meet, it would be good to have representatives of IT and Telehealth there too so that we can address all of the issues.
Monitors at open workstations, offices, and focus rooms should maintain privacy needs and ergonomics needs. Monitors should not be angled awkwardly away from end users for privacy at the expense of ergonomics safety. Focus/Huddle rooms and shared offices and hoteling spaces should be outfitted with monitors that can be connected to laptops and/or docking stations w/ laptop stands to safely support prolonged work. Employees should be instructed to bring mice and keyboards with them to focus and huddle rooms, or these input devices should be made available in the rooms. UCSF recommends that employees limit work directly on a laptop to a *maximum of one hour daily* unless external input devices are used in conjunction with the monitor being placed at safe levels approximate eye level. External monitors should be on adjustable bases (typically these have approximately 5" of built- in height adjustability). UCSF Ergonomics & Human Factors has more information if needed for planning and guideline development.	Pg. 14-15 Ergonomics/Privacy
Technology in focus/huddle rooms: some discussions have already begun about this, but from my perspective, even with my trying to standardize our laptops with Dell products, I've found in one month's time DELL changed the port configuration and OS so that we need to find adapter solutions. I'm not sure how we can make the technology in the rooms work for everyone. I'll remain hopeful IT can find a solution. My PI thinks it is ridiculous that he cannot call FreeConferenceCall.com numbers.	Pg. 16-18 Technology
U-80 Feedback/Experience	
Since most people don't have offices, it's really important that there are ample focus/huddle/conference rooms and someone who manages their scheduling. We don't have a receptionist here in U80, and while we do have an office manager who gets notified when someone rings the doorbell, she just buzzes them in and they have to find their own way. Nobody can see the door when they are at their desk. We don't have any way to easily park/transfer a call to a focus room or huddle room. There are some unscheduled calls that I would rather not take at my desk and it's really annoying to have to call someone back. The videoconferencing/display screens in huddle/conference rooms are awesome. An internet based video doorbell would be a huge improvement so that they aren't locked to one person's desk. Ownership of tech support: IT says that John DeAngelo's group supports our conference room tech, that group says they don't. Overall I'm happy in U80, but I didn't have an office that got taken away or drastically downsized.	Pg. 12-17 Consideration for local functioning units and the way space is being used currently. Technology

Low Building Utilization: It feels the opposite is truer for U-80, particularly the focus and huddle rooms. Technology: Very   important. Governance and Policy: We appointed team based floor leads who helped shape usage policy and led to an online   website (wiki) about the space. We have not experienced any issues with using the space. Occupant engagement: We were very   open about design of the space with occupants, being clear about where they had input and where they were just being informed.   Private office assignments: the employee is involved in one or more of the following activities: These were the criteria applied in U-80. a) feels iffy to me. The open environment should facilitate doing heads down work in an open space. Criteria b-d were applied:
b) on the phone continuously throughout the day c) in small group private meetings frequently throughout the day (1-2 people) d)   in confidential conversations throughout the day at their desk (eg human resources, patient oriented). Workstations should be co-   located for employees who do similar jobs together: absolutely. We found this to be very important even though everyone in U-80 is in medical education. Ratio of workstations to focus/huddle: U-80 is 1:5 and feels right. There is usually always one focus room   open. We have about 75% occupancy at any given time. Mission Hall is currently 1:19 huddle rooms; I am worried this is based on the low occupancy but if the revisions increase occupancy, this may not work. U-80 is 1:15 for Huddle Rooms and they are booked   about 50% of the time. If we include unbooked usage, I would guess it would be 70% occupancy based on a 40 hour workweek.   Acoustic/Sound transmission: All reasonable in line with the U-80 experience. Ergonomics sit/stand desks: A requirement.   Sit/stands are ubiquitious in U80 and well utilized. You introduce 'community' problems of have and have nots when you have mixed furniture. It is really an issue of all sit/stand desks now or later because the have nots will ask for them you really cannot say   no. Signage/Displays Use art to personalize program neighborhoods and permanent signage: These two items made a big   difference to the feel and comfort of U80. Conference Rooms; yes to all and aligned to our experience in U80. Focus/Huddle Rooms: We went with only a telephone in the focus rooms and required all staff to move to laptops. We have never had the need for monitors or docking stations in focus rooms as a result. Lower cost and lower maintenance of the equipment. Spend the money on Huddle rooms. Also we did not want to promote staff and faculty camping out in the focus rooms. Copy Areas: Personal printers   and faxes: we decided no faxes and no personal printers and this has worked out just fine. Maybe different for clinical staff. Workstations: Speaker Phones: We did not disable speaker phones because we found that an advantage of the IP phones is you can unplug one and take it to another sapce, perhaps a focus room if a focus room phone broke. We simply told people no   speakerphone conversations and people comply. Robust WIFI very important. Building-wide: all good recommendations.