Planning and Strategy

WORKPLACE & OFFICE
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- **Workplace Strategy**: creating a plan to boost productivity in the workplace that aligns with your business objectives.
- **Change Engagement**: communicating change in a positive manner to minimize business disruption and increase efficiency.
- **Facilities Master Planning**: developing a process that integrates your performance goals and real estate strategy to build a flexible short- and long-term road map.
About Stantec

Stantec offers one of the most diversified and integrated Architectural, Interior Design, and Engineering practices, serving clients across industries: professional services, consumer goods, technology, financial, institutional, and non-profit organizations.

Our diversified platform of professionals allows Stantec to quickly bring the necessary skill sets to projects, integrating architecture and interior design with urban planning, resiliency, MEP/FP civil engineering, and specialty services, such as lighting, acoustics, A/V, and IT.

Our integrated teams deliver results in a collaborative, coordinated and time efficient manner for projects across the globe, through a network of more than 400 offices worldwide.
WORKPLACE DRIVERS

COLLABORATION
Utilize technology and places to enhance team based work that supports corporate goals and objectives.

ATTRACT AND RETAIN
Develop spaces and work typologies that focus on the needs and desires of top talent.

EFFICIENCY AND FLEXIBILITY
Strategy for spaces that are adaptable and effective for the long term.

BRAND AND CULTURE
Fusing your mission, culture, identity and values with spaces that foster community and engagement.

HEALTH AND WELLNESS
Create strategies that support employee’s needs, boost morale and increase productivity while working to reduce health care costs.

DATA ANALYTICS
Track and analyze both quantitative and qualitative feedback from users about space preferences to enhance workplace solutions.
REPRESENTATIVE CLIENTS

AAA
Abiomed
Accenture
Adobe
Airbus Group
Airlines Reporting Corporation
American College of Surgeons
Apple
Atlantic Council
Bank of America
Bank of Montreal
Bessemer Trust
Booz & Company
Booz Allen Hamilton
CACI
Capital One
CareFirst BlueCross BlueShield
Carnival
Catholic Charities USA
Center for Democracy & Technology
Choice Hotels International
Cisco Systems
Clarks
Comcast
Corporate Executive Board
CSC
Cummins
Deloitte LLP
Dow
Fannie Mae
Fish & Richardson
Gallup Organization
Gartner
Glenstone Foundation
Google
Grant Thornton
GrubHub
Gyro
Harley Davidson
HMSHost
IBM
ICF International
Infor Global Solutions
Infrastructures Ontario
Inter-American Development Bank
International Baccalaureate
International Justice Mission
International Monetary Fund
Johns Hopkins Technology
Knotel
Leo Burnett
Lexington County
Marriott
Microsoft
MillerCoors
Molson Coors
NASA
National Retail Federation
Northrop Grumman
Pan American Health Organization
Philips Research North America
Pulte Group
R.R. Donnelley
Region of York
RMB Financial
Sasser Family Holdings
Siemens A.G.
Social Tables
Sprint
The Wilderness Society
TUMI
Twitter
Ventures
Volkswagen Group of America
WeWork
Wintrust Financial Corporation
Young & Rubicam
by 2020
more than 65 million Americans will be temps, freelancers, and independent contractors (40% of workforce)
— Forbes

by 2021
millennials will be 50% of the workforce
— The Huffington Post

individual work has decreased from 40% in 2000 to 20% today — Gartner Group

85% of Fortune’s Best Companies to Work For allow employees to telecommute or work from home at least 20% of the time
— Fortune Magazine

the average knowledge worker is at their desk only 40–50% of the time
— Gartner Group
Grant Thornton
156,000 sf
"Your vision, coaching and support have been incredible and the transformation of the Chicago Title space into our new headquarters is nothing short of amazing."
— Vincent Thomkinson, Managing Partner

Wintrust
85,000 sf
"To say we are pleased is an understatement. Stantec hit the ball out of the park on this project."
— John Reagan, SVP Corporate Real Estate

Social Tables
30,000 sf
"No one has an office and everyone’s desks are on wheels. The goal is to make sure we’re collaborating, colliding, and no seating configuration is set in stone."
— Dan Berger, Founder & CEO
Workplace Strategy

The Stantec approach to Workplace Strategy establishes a methodology that discovers the best solution for an individual company.

We engage with senior leadership and employees to understand their goals and obtain support.

5 primary ingredients for a successful workplace strategy are:

1. Alignment with business strategy
2. Design for variety of work styles
3. Choice of work environment
4. Integration of technology
5. Cultural fit
STRAIGHT PROCESS TO DRIVE WORKPLACE SOLUTIONS

Stantec uses our proven methodology to help companies discover and plan the best solutions based upon a set of goals and objectives in alignment with your business strategy.

Discovery: This stage includes Visioning, Benchmarking, Employee Surveys, Focus Groups, and an Audit to provide a ‘foundation’ of current state.

Planning: Once existing situations are confirmed, a gap analysis will be conducted to inform scenario planning exercises including standards, block and stack and testfits. Financial analyses for each scenario will be developed to assess cost implications.

Implementation: We recommend a pilot project to confirm ‘proof of concept,’ followed by the design and construction of the entire project.

Measurement: Success measurement through a Post Occupancy Evaluation survey will be conducted in order to compare and provide lessons learned.
OUR WORKPLACE STRATEGY

The future workspace promotes collaboration, embodies flexibility and provides advanced technologies. It aligns the workplace with business objectives for improved performance.

Increase Value
- Support Business Agility
- Reinforce Cultural Alignment
- Enhance Talent Pipeline
- Improve Technology Integration
- Reinforce Brand
- Enhance Health and Wellness

Reduce Cost
- Improve Real Estate Utilization
- Reduce CAPEX and OPEX
- Enhance Sustainability Efficiency
CASE STUDY

AAA
The Auto Club Group

Goals
• Provide a roadmap for change, planning, and amenities across all corporate functions
• Realign workspaces to support the needs of current and future workers to improve productivity, engagement, and collaboration while reducing costs

Stantec worked with AAA leadership and teams across a two-state footprint, surveying needs and preferences of all teams across the organization. We evaluated 640,000 SF in Michigan, and 150,000 SF in South Florida.

Client Benefits
• Improved passive utilization, reducing real estate and operational costs
• Consolidation recommendations resulting in cost saving of $500,000+ per year in rent
• Technology integration recommendations to support worker choice and engagement, productivity and innovation
• Optimized kit of parts based on activity vs. hierarchy to reduce downtime and costs

Culture and Vision Map

Culture and Vision Map
Grant Thornton

Goals
• Create a ‘WOW’ space with brand presence
• Increase real estate efficiency
• Incorporate sustainable design

Working closely with the client, Stantec created value spaces that address the 21st century workforce and their expectations, improving talent pipeline in recruitment and retention as well as happier and more productive employees.

Client Benefits
• Increased name recognition, business traffic, sales and revenue
• Cost of real estate reduced by over 20%
• Enhanced employee wellbeing with activated work space
**CASE STUDY**

**Gartner Mid-Atlantic Center of Excellence**

**Goals**
- Consolidate two offices to reduce real estate needs
- Create a space that is agile and performance-driven
- Provide environment that fosters collaboration, socializing and community
- Transition from private offices to open work environment

Stantec provide Workplace Strategy and Workplace Design services for the 350,000 SF project. For the 12 stacked floors, we created a rich menu of spaces where staff can efficiently and effortlessly navigate from assigned to non-assigned work spaces. The Cafe floor brings staff together and is designed as a park-like environment, offering dozens of seating and lounging arrangements inspired by the outdoors.

**Client Benefits**
- Real estate needs were reduced by 23%
- At the same time, space occupancy increased by 40%
- The sheer number of work options allows individuals to customize their daily routine and maximize their time between focused collaborative, social, and learning environments
To be effective and competitive in today’s global economy, companies must anticipate future opportunities; rapid adaptation and fast change cycles are the norm. A progressive workplace environment is essential to business success.

While workplace strategy focuses on delivering the best new office space solution for the employees, Change Engagement is the process where we prepare the employees for the new office space.

Our process brings together stakeholders, identify key champions, and develop a broad communication program that engages all interested parties.

Our clients’ common concerns about change
- Accomplishing leadership goals
- Minimizing business disruption
- Communicating to employees
- Retaining talent
COMMUNICATING CHANGE

Stage 1: Inform — we mitigate employees’ resistance to change through communication
Stage 2: Support — we help employees understand the reason for the change
Stage 3: Direction — we guide employees to see the positives of change and how this will help them
Stage 4: Encouragement — we encourage employees to accept change and embrace the benefits of a new way of working
CUSTOMIZED CHANGING ENGAGEMENT PROCESS

At Stantec, we've developed scalable comprehensive approaches for collecting, analyzing, documenting, and communicating information to internal and external stakeholders. Knowing who to involve in a project, and being able to answer who, what, where, why, when and how is almost as important as the physical environments end result.

Based on the amount of change that will take place and your current culture, clients can choose from the following customizable levels, based on need:

- **Level 1**
  Typically provided for smaller cultural and workplace renovation projects

- **Level 2**
  Typically provided when there is a cultural change and/or a physical change of environment

- **Level 3**
  Typically provided for large scale cultural, geographical and/or environmental changes

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### Scalable Change Engagement Examples

#### Level 1 – smaller cultural and workplace renovation projects

Categorization:
- **1** change roadmap
- **2** Pre Occupancy Survey
- **3** welcome guide
- **4** web content
- **5** post Occupancy Survey

Outcomes:
- roadmap for communications
- pre and post occupancy data
- establishing a change champion team

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#### Level 2 – cultural change/physical change of environment

Categorization:
- **1** change roadmap
- **2** design liaison
- **3** Pre Occupancy Survey
- **4** welcome guide
- **5** comms
- **6** web content
- **7** employee training
- **8** Post Occupancy Survey

Outcomes:
- roadmap for communications
- pre and post occupancy data
- establishing a change champion team
- client interaction
- training for technology

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#### Level 3 – large scale cultural, geographical/environmental changes

Categorization:
- **1** change roadmap
- **2** design liaison
- **3** Pre Occupancy Survey
- **4** welcome guide
- **5** comms
- **6** web content
- **7** manager training
- **8** employee training
- **9** Post Occupancy Survey
- **10** playbook

Outcomes:
- stakeholder evaluation
- roadmap for communications
- pre and post occupancy data
- establishing a change champion team
- client interaction
- training for technology
- on-site support
- playbook guide to roll out change engagement
Denver Water — Workplace of the Future

Goals
- Become the "Employer of the Future"
- Increase space use efficiency
- Engage all employees in change process
- Create a work environment to attract new young talent

Upon completion of a campus master plan, Stantec was engaged to facilitate a pre-design change engagement process for the organization centered around defining what the "Workplace of the Future" should look and feel like in their new Administration building.

The process included surveying all employees about needs, preferences and vision; working with a task force to define a variety of new space types; designing and installing prototypes of new space types for evaluation; post-occupancy surveys to identify what employees liked/didn't like. This feedback then influenced the design of the workspace in the new building.

Client Benefits
- Increased ratio of collaboration spaces
- Introduction of focus rooms on every floor
- Creation of multi-purpose lounge/workspace

What do you like most about the spaces on first floor? (check all that apply)

- Cafe booths, bar, tables
- Fountain lounge
- Technology station

- Location in building / it's something new / improvement over existing spaces
- Openness / enclosure, or privacy / support of collaboration
- Visibility / lack of visibility
- Furniture / lighting / technology
Adobe — Boston Relocation

Goals
- Culture shift from 80% of staff in private offices to open plan
- Reduce SF per person
- Open collaborative work environment

Stantec led cross functional focus groups and interviewed senior leaders early in the process. New workspace scenario mock-ups were provided and an online survey solicited feedback for the design team. Site-wide meetings were held on a quarterly basis to engage with the staff about project design. Additionally, a project dashboard was developed for senior management to provide them a snapshot of key project indicators as well as the ability to dive into specifics on any topic as needed.

Client Benefits
- Transition from 80% private offices to 90% open plan
- Increased headcount capacity by 50%
- Annual cost savings in rent of +/- $1M.

One of the successes of this project was engaging the entire staff in the office relocation as well as in their transition from a culture of private offices to an open plan. In the above chart, each row indicates a different team in which the design team engaged during the planning process. The chart itself reflects the overall project schedule and how often each team was engaged.
Facilities Master Planning

The goal is to develop an optimization roadmap that is both implementable and adaptable over time. Stantec’s approach is holistic and comprehensive, customized to meet each client’s unique scope, facility type and priorities.

Stantec delivers comprehensive and integrated Facility Master Planning services with a team including, financial analysts, MEP, civil, structural engineering, IT/AV technology specialists, architects, urban planners and other specialists as needed.

Stantec team provides:

- Full time staff who are dedicated to Facilities Master Planning
- Planners with depth of project experience in different sectors (public and private)
- Analysts experienced with complex organizational systems
- Ability to deliver services on a regional or national basis
WHY DEVELOP A FACILITIES MASTER PLAN?

DISCOVERY: The optimization of space and real estate utilization creates more efficient and functional space that has a positive impact on the bottom line. Strategic planning allows for maximizing flexibility and future adaptability so organizations can remain nimble and current.

ANALYSIS: To improve service delivery both internally and externally to impact the organization’s effectiveness and performance.

RECOMMENDATION: Support of short and long term strategic goals helps guide an organization into the future with a clear direction and plan.

IMPLEMENTATION: Adoption of applicable Workplace Strategies into the planning process contributes a holistic approach that improves employee wellness, productivity and engagement.

FACTILITIES MASTER PLANNING

Benchmarks, Trends, Standards

Periodic Updates

Gap Analyses

Financial Analysis

Alternative Solutions

Program Plan

Audit/Conditions Assessment

Funding & Implementation

Short-, Mid-, Long-term Recommendations

Analysis

Discovery

Implementation

Recommendation
Colorado State Capital Complex Master Plan

**Goals**
- Reduce underutilized space in owned State buildings
- Understand of historic significance of some buildings
- Conduct analysis of space needs, leased inventory and capital cost improvements

Stantec reviewed current space utilization and standards and benchmarked these against each other and against peer institutions across the Country to establish target SF/seat ranges depending on the agency function. Space standards established SF/seat ranges based upon agency function and space needs projections were developed as well as a gap analysis to identify shortfalls.

**Client Benefits**
- Vacated a significant portion of leased inventory in favor of constructing a new State Administration office building
- Determined agencies with dramatic swings in staffing should remain in leased space
- Consolidation of agencies optimized adjacency and service delivery
Lexington-Fayette KY Urban County Government
PEQPW Facility Assessment

Goals
- Increase operational efficiency and space utilization
- Increase the level of service to the citizens
- Reduce overall cost and expenses
- Develop a strategic plan to position for the future

The study assessed the location and condition of the property and assets used by its five Divisions in order to develop an overall master plan that optimizes the use of county-owned property, and minimizes the use of leased property. It also proposed a master layout of the Divisions, enabling the most efficient administrative and operational usage possible. Stantec provided audits and benchmarking of the existing conditions; employee surveys and leadership interviews; a “blue-sky” workshop to explore aspirations and possibilities; and scenario planning.

Client Benefits
- Three ranked alternates developed for 2020, and compared to current 2017 existing condition
- Scenarios paired with the anticipated capital and annual expenditures

SUMMARY: SCENARIO 1
New campus on Site A

FINANCIAL OVERVIEW
Capital expenditures could be offset by sale of vacated properties.

LEGEND: SCENARIO MAP
A
Used
Vacated
Communities are fundamental. Whether around the corner or across the globe, they provide a foundation, a sense of place and of belonging. That’s why at Stantec, we always design with community in mind.

We care about the communities we serve—because they’re our communities too. This allows us to assess what’s needed and connect our expertise; to appreciate nuances and envision what’s never been considered; to bring together diverse perspectives so we can collaborate toward a shared success.

We’re designers, engineers, scientists, and project managers innovating together at the intersection of community, creativity, and collaboration. Balancing these priorities results in projects that advance the quality of life in communities across the globe. Stantec trades on the TSX and the NYSE under the symbol STN. Visit us at stantec.com or find us on social media.