



# Wake County Human Services Master Plan Executive Summary

December 22, 2017



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# Executive Summary

## Wake County Human Services Master Plan Intro & Goals

Wake County has experienced significant population growth in the past 15 years, and with population expected to continue to rise in the coming years, Wake County Human Services (WCHS) partnered with JLL and IA to assist them in development of a Human Services 20 Year Service & Facilities Master Plan to ensure that WCHS can meet their increased demand and continue to maintain a high level of service expected by the community.

JLL and IA were engaged to help WCHS identify improvements to the service delivery process and outline potential occupancy scenarios that align with the community's long-term projected service delivery needs.

### Service and Facilities Master Plan Goals

1. *Review the overall HS program, services and processes; develop recommendations based on best practices and the future needs of the population to **ensure optimal client experience**.*
2. *Develop solutions to **optimize client experience, efficiency and productivity** of our team.*
3. *Consider the **geographic footprint of HS & complementary organizations**, options for where we are located, and whether we have the right overall real estate footprint.*
4. *Assist Human Services in **strategically aligning to the population** that it serves.*
5. *Support a healthier and better Wake County.*

The following Executive Summary and supporting Appendix outlines the process undertaken to evaluate the existing HS service delivery model and real estate portfolio, development of the future service delivery framework, as well as identifies potential occupancy scenario options and workplace strategy recommendations for the future Wake County Human Services real estate portfolio to support and enhance service delivery.

# Master Plan Project Participants

Wake County		Project Mgmt.	Core Team	Steering Committee	SME
John de Haro	FDC	X	X	X	
Jackie Brady	Information Service			X	X
Kelli Braunbach	GSA		X		
Heather Drennan	Budget			X	
David Ellis	Deputy County Mgr.			X	
Dwayne Eury	Security				X
Mark Forestieri	FDC	X	X	X	
Dave Goodwin	GSA			X	
Meagan Honnold	Budget			X	
Brett Kenney	Budget		X		
Tiffany Lucey	GSA				X
Annemarie Mariano	Human Services		X		X
Johnna Rogers	Deputy County Mgr.			X	
Michelle Venditto	Budget		X		
Ross Yeager	Human Services			X	X
Bill Greeves	Chief Information & Innovation Officer				X
John Higgins	Chief Technology Officer				X
Regina Petteway	HS Director				X

## JLL / IA

Robert Dion, JLL	Overall Executive Oversight, Portfolio Lead
Tim Purtell, JLL	Engagement Lead, Portfolio Lead
Michael Koss, JLL	Process Improvement Lead
Gary Yates, JLL	Demographics Assessment
Leah Barrett, IA	Workplace Lead
Tish Kruse, IA	Workplace Lead
Bill Sandridge, JLL	Local Market Expertise
Hannah Schmitt, JLL	Engagement Support
Melissa Carter, IA	Engagement Support
Michele Graner, IA	Engagement Support

## Other Project Involvement:

- Wake County Human Services Program Directors
- Wake County Human Services Partners
  - Alliance Behavioral Health
  - Monarch Behavioral Health
  - Salvation Army
  - Wake Technical Community College
  - Youth Thrive (funded by United Way)
  - UNC-CH
  - Alliance Medical Ministries
  - Wake Med
- Wake County Human Services Clients

# Project Charter

Approved on 09.07.17

## Business Case / Objective / Opportunity Statement

Wake County has identified a need to develop a master plan for its Human Services department. Wake County has requested that JLL and IA assist them with the development of a **Human Services 20 Year Service & Facilities Master Plan** to identify improvements to the service delivery process and outline potential occupancy scenarios that align with the community's long-term projected service delivery needs.

## Goal Statement

Wake County Human Services has identified a need to develop a Human Services Long Term Service & Facilities Plan that:

1. *Reviews the overall HS program, the services and the processes, based on best practices and the future needs of the population to ensure optimal client experience.*
2. *Develops solutions to optimize client experience, efficiency and productivity of our team.*
3. *Considers the geographic footprint of HS & complementary organizations, options for where we are located, and whether we have the right overall real estate footprint.*
4. *Supports a healthier and better Wake County.*

## Project Scope

- **Scope:** Current Service Delivery Assessment & Process Re-Design, Workplace Assessment & Future State Programming, Occupancy Scenario & Facilities Plan Development
- **Process:** Real Estate Master Planning & Process Improvement
- **Planning Horizon:** initially 10 year horizon, expanded to 20 year plan



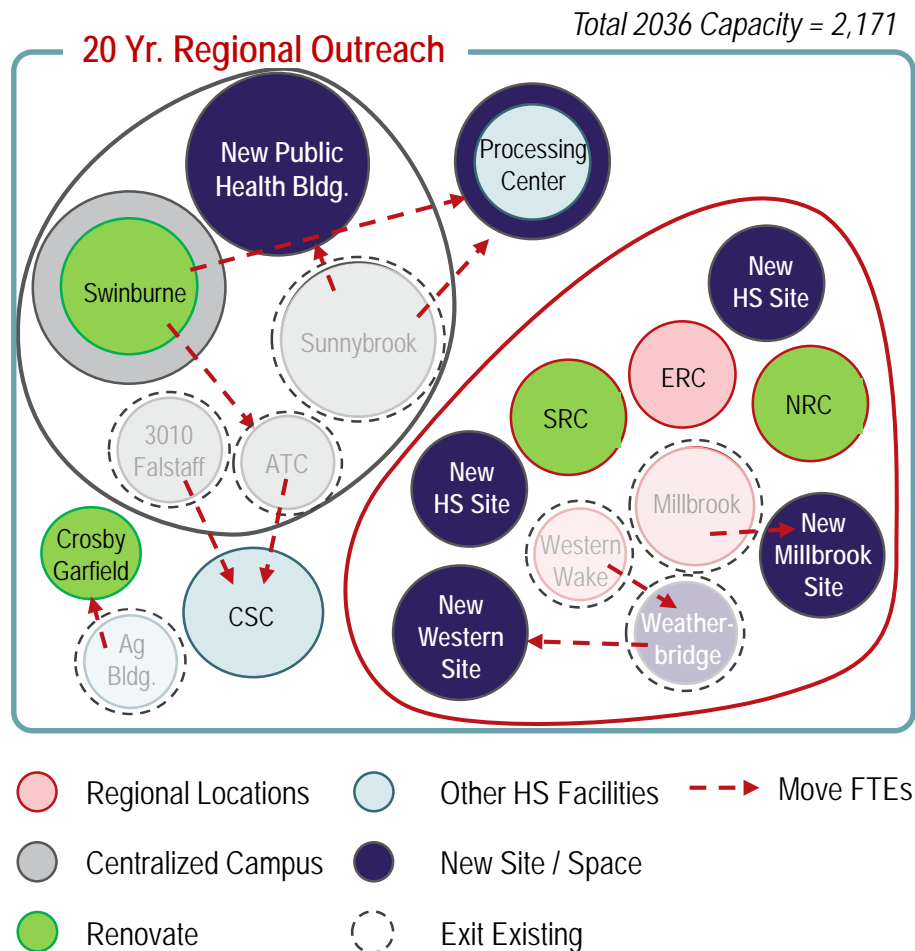
# Master Plan Scenarios: *Recommended Scenario*



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# 20 Yr. Regional Outreach (Scenario 5): Key Actions Summary



## Key Actions – 20 Yr. Regional Outreach

### Lease Actions:

- New Millbrook Leased Site (*within ½ mile of current*)
- Exit Western Wake; Occupy New Weatherbridge Site Through 2025
- **New Leased Western Human Services Site (w/Dorcas Ministries) – 20,800 RSF**
- **Two New Owned Buildings to Accommodate Future Growth, Locations TBD Based on County Needs 2030+**
- Increase Leased Footprint of Processing Center

### Project Expense & Capital Actions:

- Collocate 50% Admin & Ops FTEs at Processing Center
- Fit-Out of New Processing Center Space & New Leased Western Human Services Site
- **Build Two New Human Services Buildings to Accommodate Growth Years 2030+**
- Fit-Out of CSC for ATC & Falstaff Staff / Partners; **Demolish ATC & Falstaff**
- **Sale of Sunnybrook**; Build New Public Health Building with Parking Deck
- Transformational Renovation Swinburne [-47 seats] (Floors 1,2,3 only; two phases 2020 & 2027)
- Transformational Renovation of Crosby Garfield for Addition of Ag Building Staff
- **Expansion & Transformational Renovation of NRC & SRC**

# 20 Yr. Regional Outreach (Scenario 5): Future Location Summary of WCHS Portfolio

*The future location of facilities are marked based on the following categories:*

- New Human Services Facility
- Expansion of Existing Human Services Facility
- Planned Exit from Human Services Facility
- Regional Locations
- Centralized Campus
- Other HS Facilities

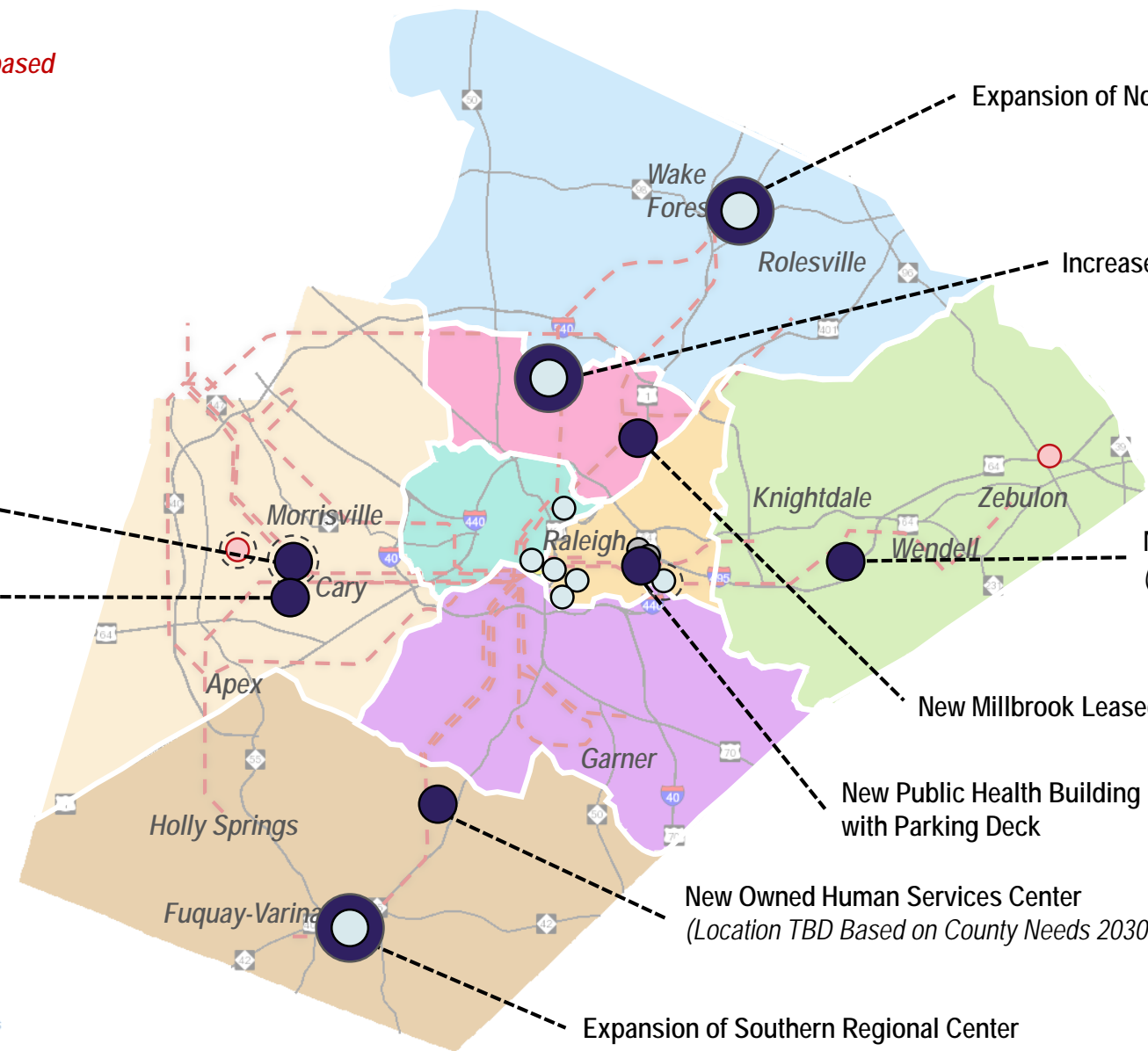
Weatherbridge Human Services Center

New Leased Human Services Center  
(w/Dorcas Ministries)

## Wake County Planning Regions

- East Central
- East
- North Central
- Northern
- South Central
- Southern
- West Central
- West

0 5 10 20 Miles



Expansion of Northern Regional Center

Increased Leased Footprint of Processing Center

New Owned Human Services Center  
(Location TBD Based on County Needs 2030+)

New Millbrook Leased Facility

New Public Health Building  
with Parking Deck

New Owned Human Services Center  
(Location TBD Based on County Needs 2030+)

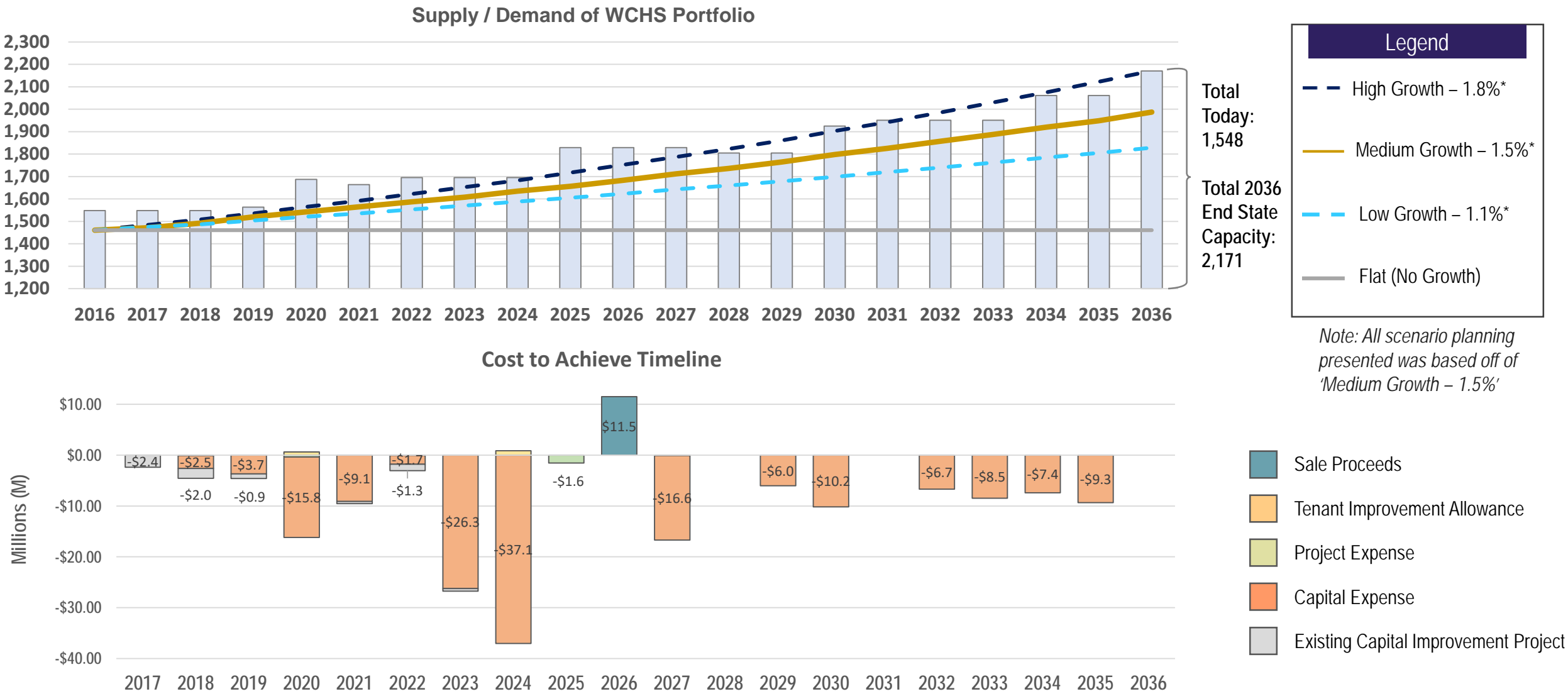
Expansion of Southern Regional Center

Data Source: STI Popstats, 4Q2015

Data has been agglomerated from the block group level to represent the entire county.

*\* Red dashed lines depict proposed transportation routes per the Wake County Transit Plan, approved FY2017*

# 20 Yr. Regional Outreach (Scenario 5): Metric Summary



Note: Projected growth is based off of historical service units, historical FTEs, process improvements & population growth



# Implementation Roadmap: *Master Plan Actions by Fiscal Year*



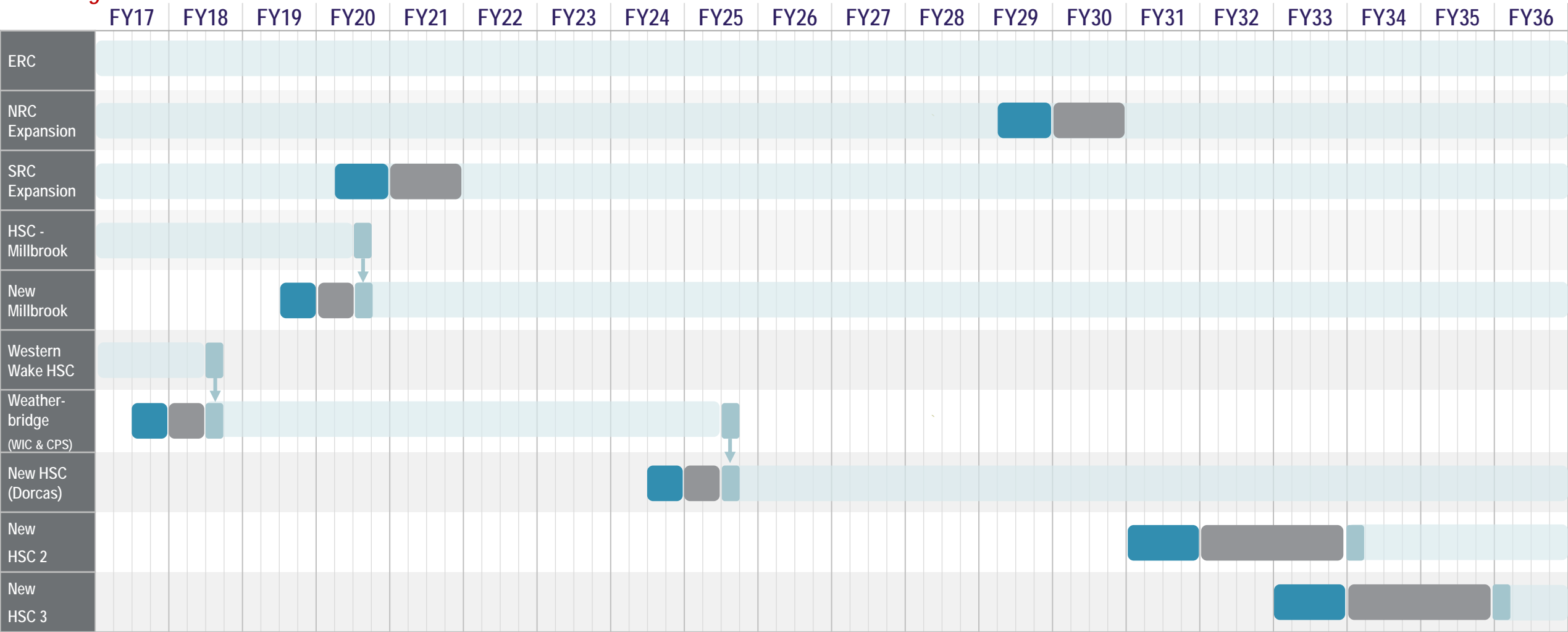
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# Campus Enhancement (Scenario 3): Metric Summary

## Regional Facilities

- Design
- Demolish
- Move / Occupy
- Construction Fit-up
- Sell



# Campus Enhancement (Scenario 3): Metric Summary

- Design

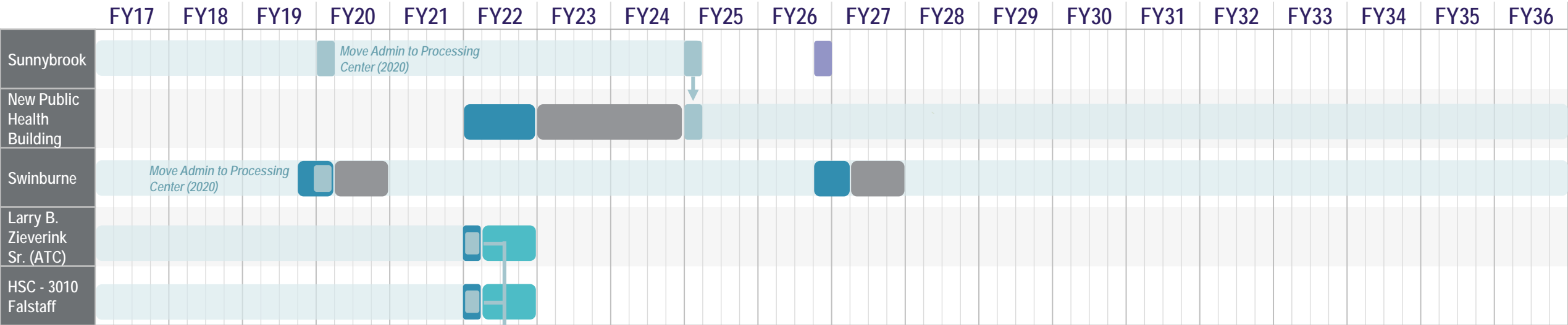
Demolish

Move / Occupy

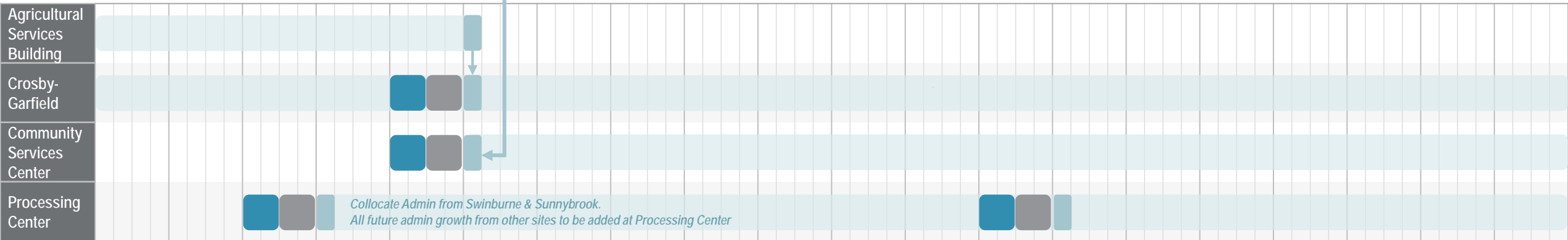
Construction Fit-up

Sell

## Centralized Campus Facilities



## Non-Client Facing Facilities



# Additional Considerations for Implementation

The list below represents items that should be considered prior to implementation of the final scenario recommendation

- Complete **Facility Cost Assessments (FCA's)** for all buildings included in recommended scenario
- Conduct a **utilization study** to measure client / staff usage of space per facility & service
- Improve **data collection** – consider tracking client visits per facility & service
- Ensure that all new leases provide **options for expansion** to accommodate growth beyond FY2026
- Complete a **targeted assessment of housing services** in the following facilities
  - Cornerstone
  - South Wilmington Street Center
  - Wake House



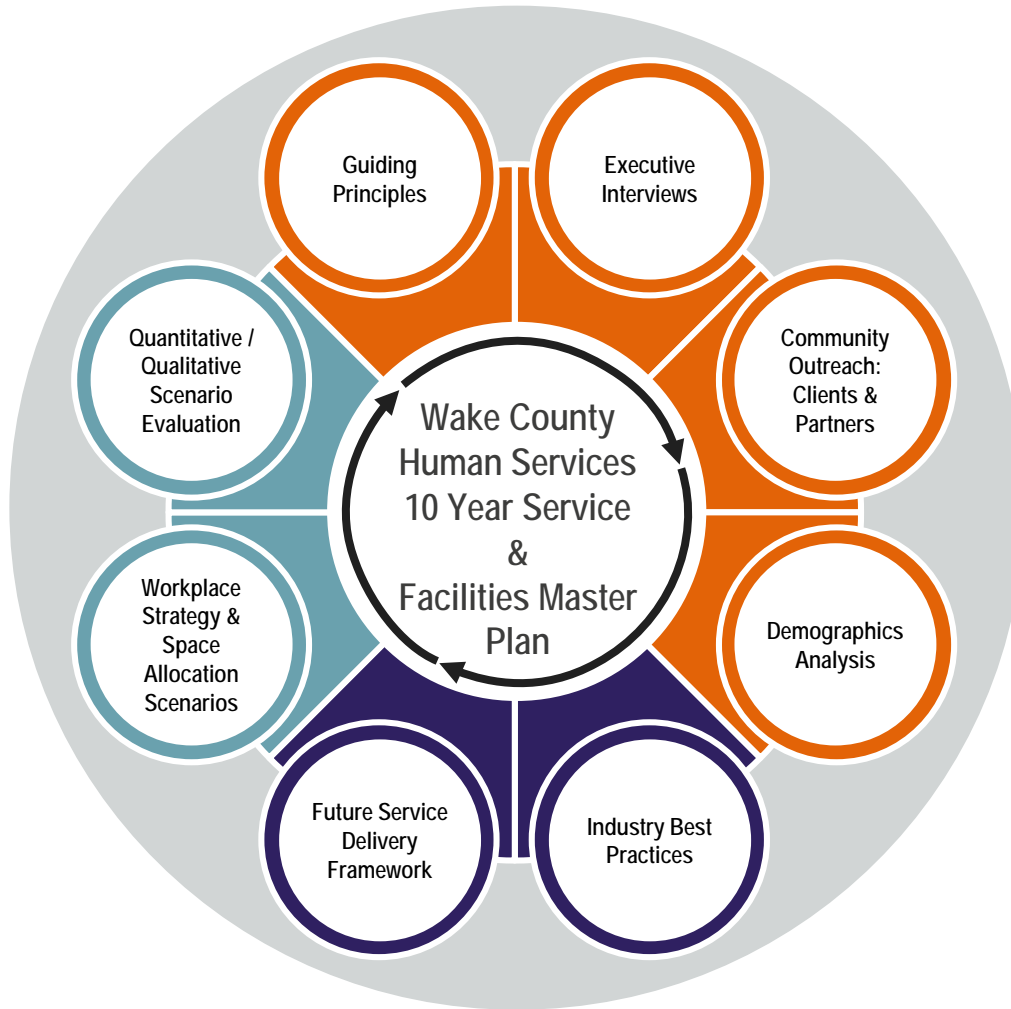
Evolution of Master Plan:  
*Project Evolution,  
Future Service Delivery, Workplace Strategy*



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# Evolution of the Master Plan



The Master Plan was developed in 3 phases:

1. *Current State Assessment*
2. *Service Delivery Recommendations*
3. *Master Plan Scenario Development*

# Project Vision: Guiding Principles\*

Approved on 01.03.17

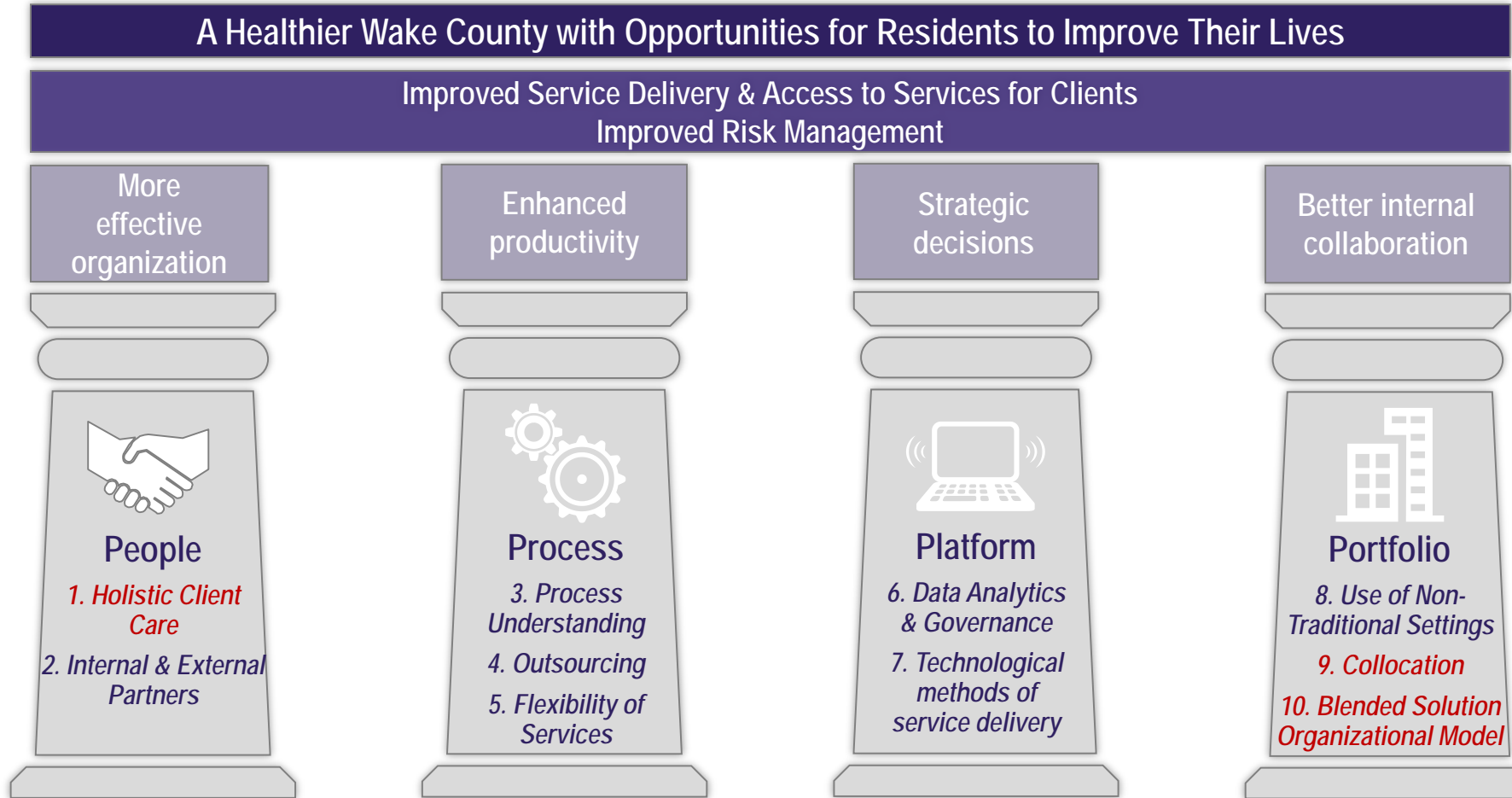
WCHS Strategic Objectives	Master Plan Guiding Principles
Provide high quality client experiences	<ul style="list-style-type: none"><li>▪ Treat the whole client by grouping services together</li><li>▪ Improve wayfinding &amp; accessibility of services to promote client self-navigation</li><li>▪ Support quality customer service through appropriate facility design</li><li>▪ Streamline service delivery to minimize client waiting times</li></ul>
Ensure physical accessibility for Wake County Human Services Clients	<ul style="list-style-type: none"><li>▪ Ensure site locations are near populations being served, in close proximity to public transportation, and have safe &amp; ample parking areas</li></ul>
Provide a safe environment for Wake County Human Services clients & employees	<ul style="list-style-type: none"><li>▪ Provide sufficient and adequately designed client / staff interaction spaces</li><li>▪ Provide a safe &amp; secure employee work environment</li><li>▪ Provide adequate spaces for populations that benefit from separation</li></ul>
Support service delivery efficiencies that will adjust to future population / service growth or decline	<ul style="list-style-type: none"><li>▪ Create a high-level workplace strategy that supports a variety of workspace &amp; settings (individual vs. meeting vs. open collaboration space)</li><li>▪ Increase flexibility of facilities to accommodate future changes</li><li>▪ Provide the ability for expansion and contraction opportunities of facilities</li></ul>
Promote positive relationships with the Wake County community	<ul style="list-style-type: none"><li>▪ Utilize community partnerships to strengthen current service offerings</li><li>▪ Locate facilities in areas that are supported by the community</li></ul>

*The Project Team developed the Guiding Principles as support for the Master Plan business case. These principles have formed the basis of project guidance, option development and evaluation.*

\* Note: These objectives & principles are not in an order of importance

# Future Service Delivery Framework

People, Process, Platform, Portfolio



*With the acquired knowledge of vision, processes, demographics, and community needs, a service delivery framework for the future was created.*

*Each initiative of the framework will support and enhance the organization's processes to achieve a more predictable, repeatable and efficient delivery of services to Wake County's citizens.*

*The three initiatives in red have direct impacts on Wake County's real estate portfolio; all other initiatives primarily impact service delivery*




# Real Estate Implications from Future Service Delivery Framework

*Three of the Future Service Delivery Framework initiatives have a significant impact on Wake County Human Services' real estate.*

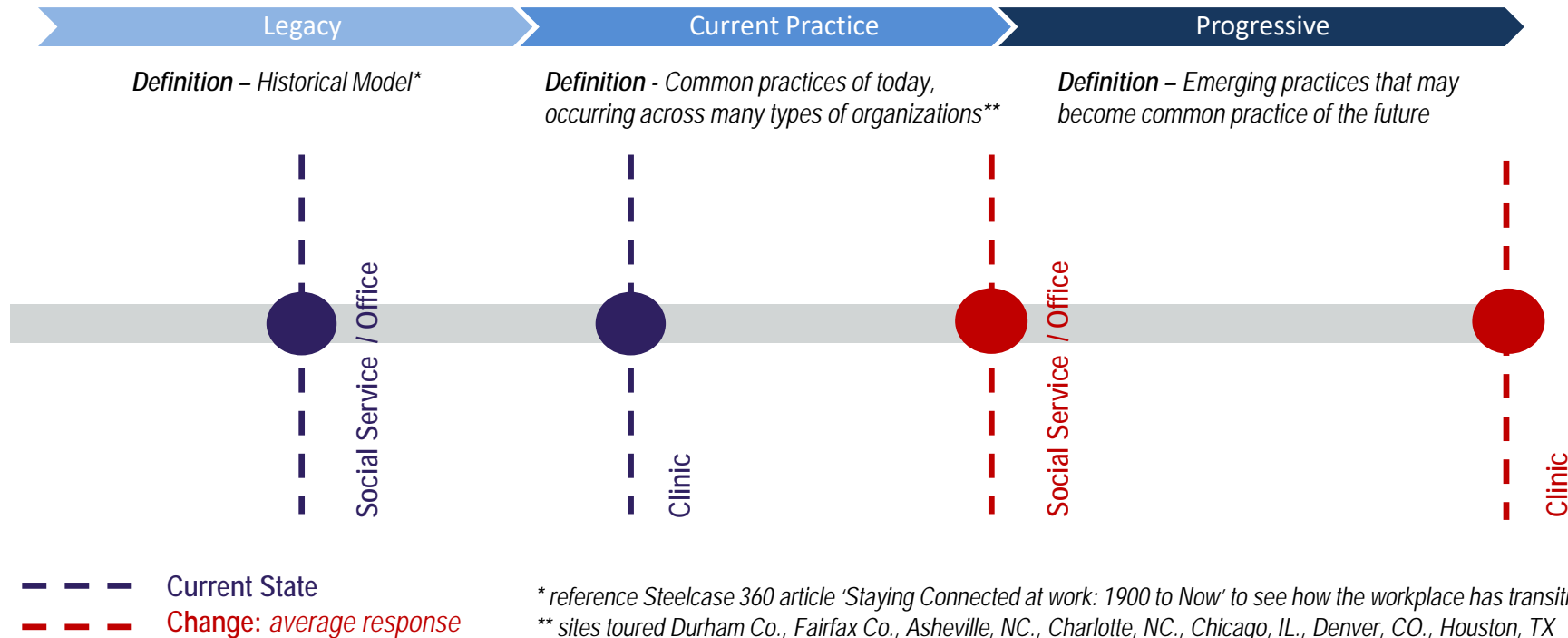
*All other framework initiatives are assumed to primarily impact service delivery.*

## Future Service Delivery Framework Initiative

## Real Estate Implications

- |  |  |  |
|--|--|--|
| <b>1.</b> Develop a human services system, coordinated with internal & external partners, that supports holistic client care |   | <ul style="list-style-type: none"><li>• Change in ratio of client facing to office space needed to support improved client service</li><li>• Improvement of flexibility in client facing space to support various types of client interaction (i.e. triage teams, larger client meetings, ebb and flow of client demand)</li></ul>   |
| <hr/>  |  |  |
| <b>9.</b> Collocation of support functions (finance, admin, call center, etc.)   |   | <ul style="list-style-type: none"><li>• Potential for cost and space efficiencies obtained by collocation of support functions who have similar infrastructure needs (i.e. security, IT, management, etc.)</li><li>• Newly vacated space can potentially be reallocated for client facing functions</li><li>• Identification of existing space or new space required</li></ul> |
| <hr/>  |  |  |
| <b>10.</b> Continued development of regional and neighborhood service delivery through blended solution organizational model |  | <ul style="list-style-type: none"><li>• Addition of new locations regionally rather than in the centralized East Raleigh campus</li></ul>  |

# Workplace Strategy: Appetite for Change



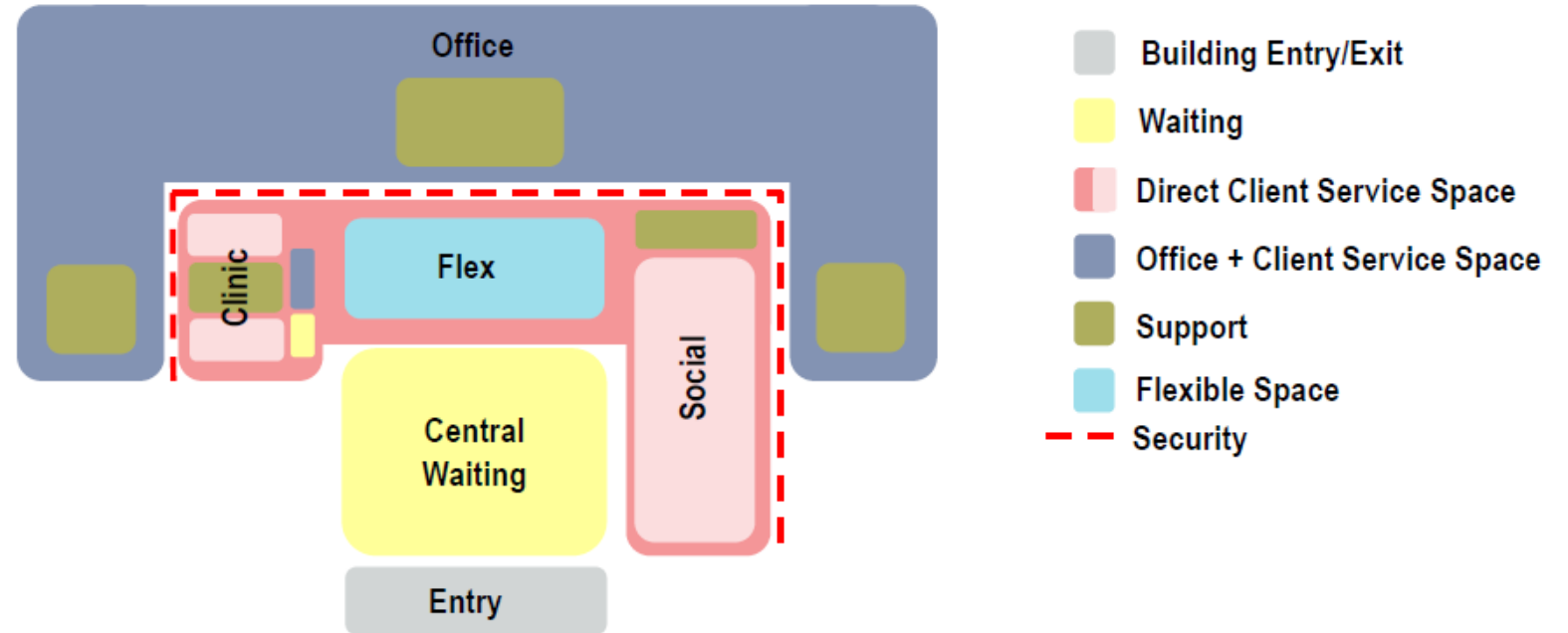
Key Wake County stakeholders were asked to identify their overall comfort level for workplace change in regards to Legacy, Current Practice and Progressive space practices.

The average participant felt comfortable targeting progressive space practices for WCHS Clinic workspace, but targeted current practice space practices for Social Services and Office workspace.

# Transformational Renovation: Workplace Standards

- Space is transformed to support significant process changes
- Clients are not brought back into the employee workspace; instead, client meetings occur in public client space

*Given the amount of change from current state that project stakeholders support, transformational workplace standards have been recommended to be a part of the master plan for all renovations and new building fit-outs.*



*\*Clinic waiting area(s) demonstrate separation of sick vs. well*



# Current State Portfolio Summaries: *Location Summary, Supply & Demand*

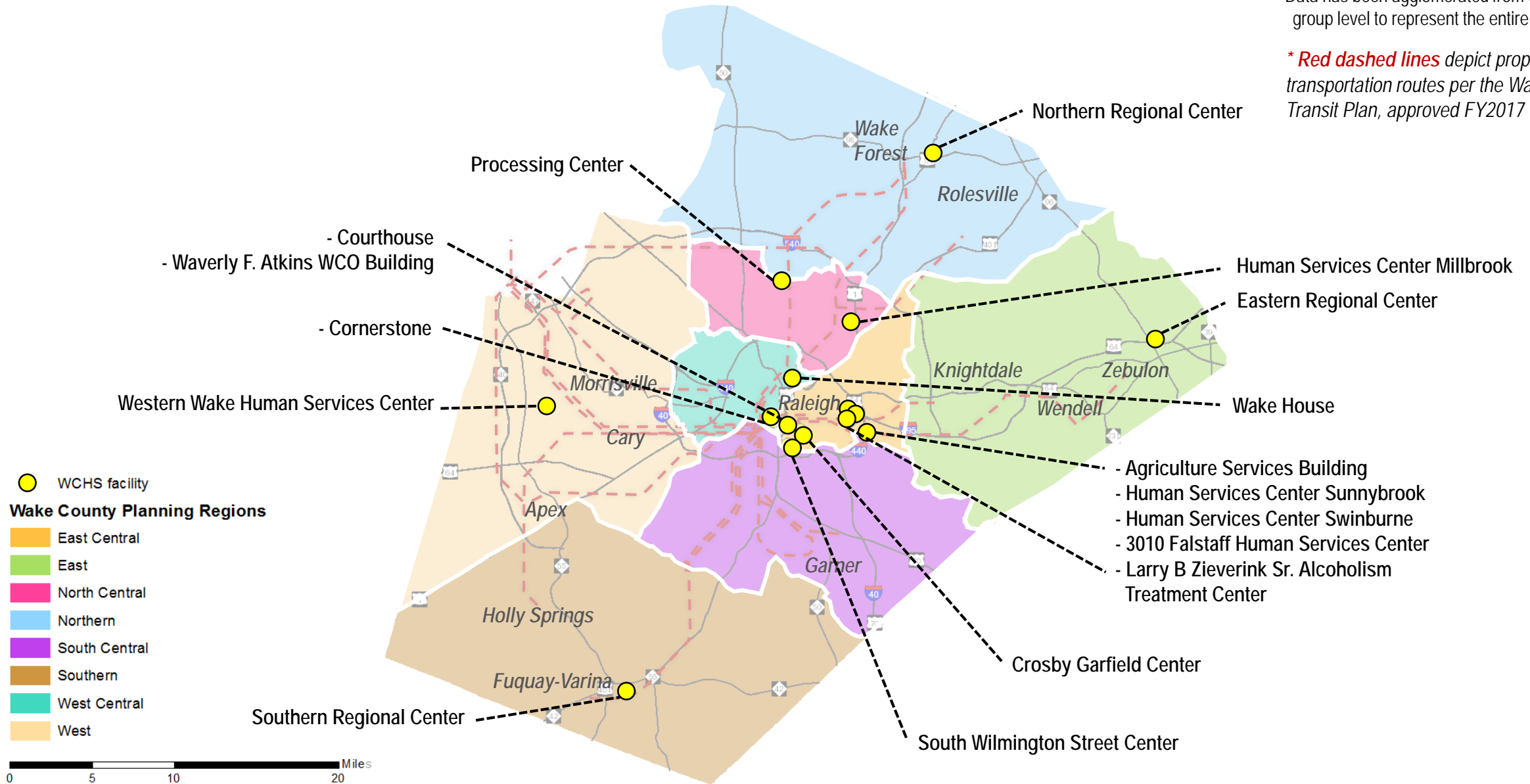


# Current State Location Summary of WCHS Portfolio

Data Source: STI Popstats, 4Q2015

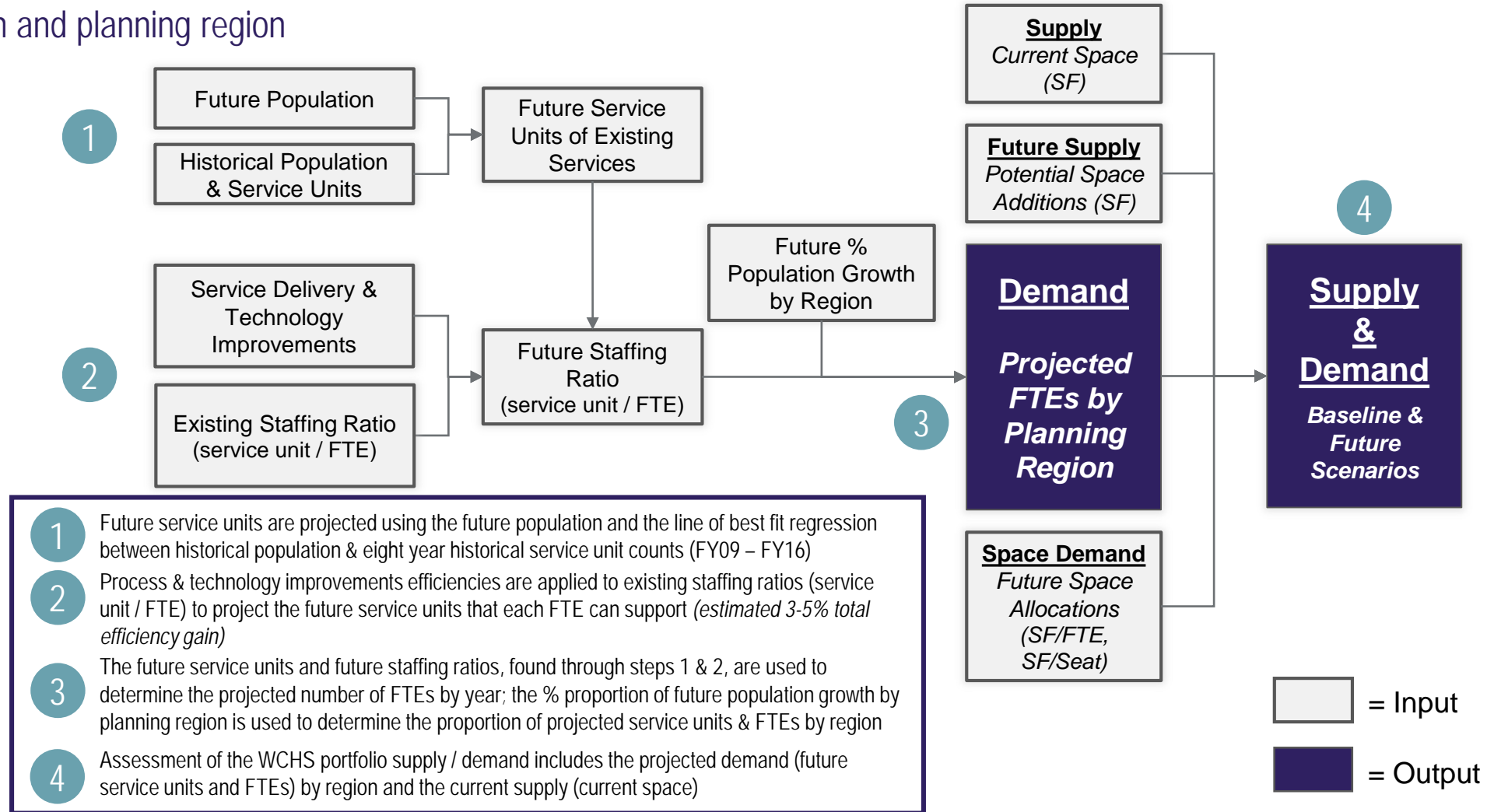
Data has been agglomerated from the block group level to represent the entire county.

*\* Red dashed lines depict proposed transportation routes per the Wake County Transit Plan, approved FY2017*



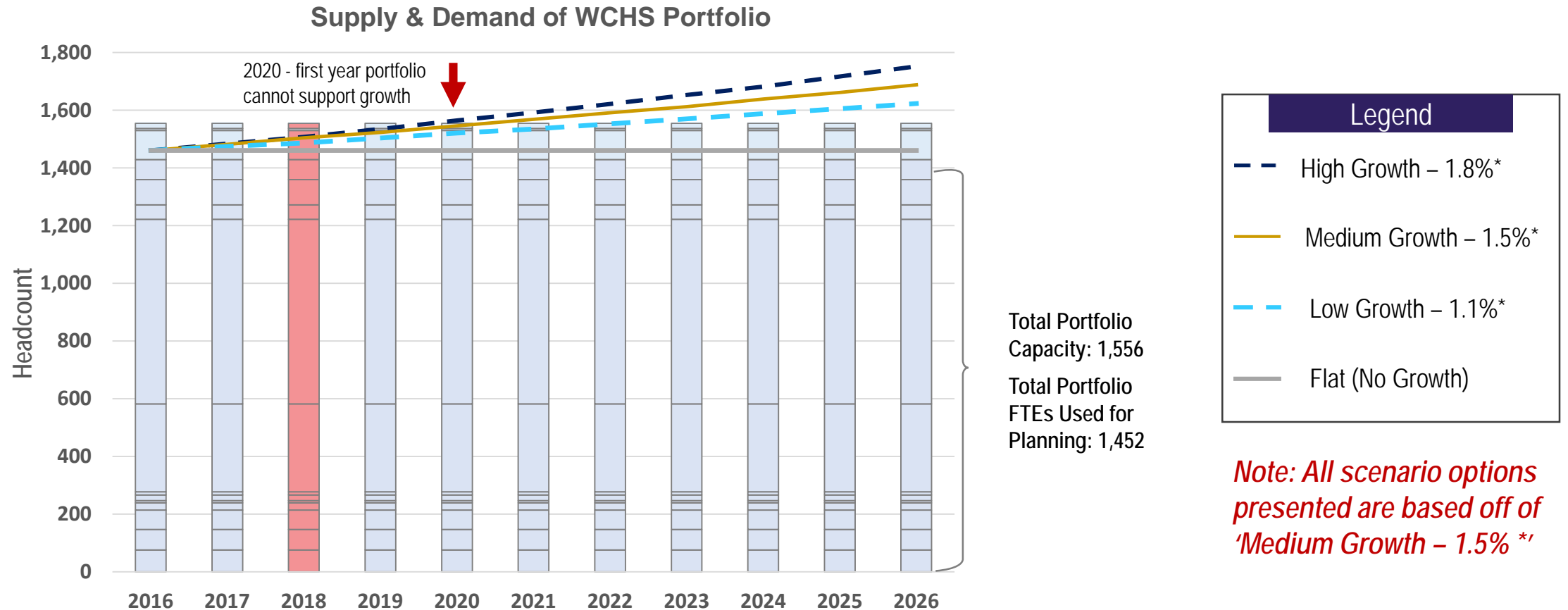
# Projected Growth Methodology

By division and planning region



# Current State Supply & Demand of WCHS Portfolio

Projected growth is based off of historical service units, historical FTEs, process improvements & population growth



FY2018 is highlighted in red to indicate the first feasible fiscal year for planning consideration

*Note: All scenario options presented are based off of 'Medium Growth – 1.5% '\*'*



# Master Plan Scenarios: *Scenario Evaluation*

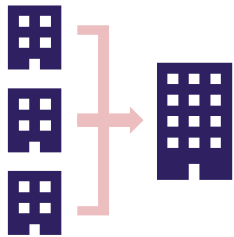


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# Options Considered for Accommodating Growth

*The five scenario options below were assessed by key stakeholders;  
favorable elements were combined into three final Master Plan scenarios:*



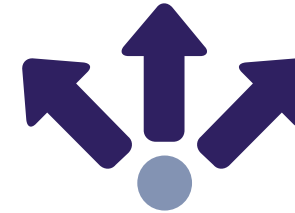
Implementation of New Workplace Standards



Collocation of Support Functions

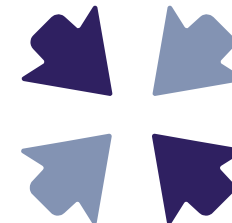


New Human Services Center Location Strategy



Millbrook Strategy: New Location

Consolidation of Underutilized Non-Core Facilities



# Scenario Evaluation Criteria

Approved on 01.03.17

Evaluation criteria have been developed based on Wake County Human Services Strategic Objectives and JLL recommended criteria for master plan solution evaluation	
Scenario Evaluation Criteria	Weight
<b>Client Experience</b> Quality client interactions influenced by service delivery & space	17%
<b>Geography</b> Sites provide proximity to population served, ample parking, public transportation	17%
<b>Safe &amp; Secure Environments</b> Space that promotes the safety of clients and employees	17%
<b>Efficient &amp; Effective Service Delivery</b> Real estate portfolio that has the ability to expand or contract based on future demand	17%
<b>Community Relationships</b> Facility locations that promote & strengthen community partnerships	17%
<b>Capital Expenses</b> Level of initial project investment and impact on future on-going costs	15%

# Scenario Financial Comparison

	Baseline <i>Scenario 1</i>	Campus Renovation <i>Scenario 2 (10 year)</i>	Campus Enhancement <i>Scenario 3 (10 year)</i>	Campus Renovation + 10 Years <i>Scenario 4 (20 Year)</i>	20 Year Regional Outreach <i>Scenario 5 (20 year)</i>
Scenario Metrics	<i>Occupancy – End State (2026)</i>			<i>Occupancy - End State (2036)</i>	
Area (RSF)	490K	510K	500K	600K	575K
Workspaces	1,687	1,780	1,853	2,238	2,171
Headcount	1,683	1,683	1,683	1,983	1,983
Workspace Vacancy %	0%	5%	9%	11%	9%
Scenario Cash Flows					
Cost to Achieve	(\$22.9M)	(\$87.7M)	(\$81.4M)	(\$158.2M)	(\$157.4M)
Variance to Baseline	\$0	(\$64.8M)	(\$58.5M)	(\$135.3M)	(\$134.5M)

# Scenario Advantages & Disadvantages

## Baseline Scenario 1

### Advantages

- Partially alleviate capacity issues at centralized campus facilities by removing non-client facing staff
- Improve service delivery in Western region
- This is the lowest cost solution

### Disadvantages

- Several buildings will continue to be over capacity
- Limited ability to accommodate growth
- Space does not fully support future process changes
- Maintenance expenses remain when reutilizing existing buildings
- Difficulty in meeting future demands
- Portfolio cannot support growth by year 2027

## Campus Renovation Scenario 2

- Partially alleviate capacity issues at centralized campus facilities by removing non-client facing staff
- Improvement of service delivery in regional locations
- Centralizes non-client facing staff
- Renovation and collocation allows for reallocation of client facing space & office space at centralized campus
- Vacancy goal sustained until 2025

- Transformational renovation of Sunnybrook does not fully alleviate capacity issues
- Renovations may cause more disruption for employees
- Maintenance expenses remain when reutilizing existing buildings
- Large capital investment required to implement workplace standards in existing space

## Campus Enhancement Scenario 3

- Alleviate capacity issues at centralized campus facilities and decrease business disruption
- Improvement of service delivery in regional locations
- New space fully supports future service delivery changes
- Addition of parking deck at centralized campus
- Vacancy goal sustained until 2027

- Large capital investment required to build new public health building
- Portfolio cannot support growth beyond 2032
- No transformational renovation for Swinburne, will require continued use of secured office space as client facing space

# Scenario Advantages & Disadvantages

## Campus Renovation + 10 Yrs. *Scenario 4 (20 Year)*

### Advantages

- Partially alleviate capacity issues at centralized campus facilities by relocating non-client facing staff
- **Improvement of service delivery at regional locations**
- Centralizes non-client facing staff
- Renovation and collocation allows for reallocation of client facing space & office space at centralized campus
- Large **new 2<sup>nd</sup> Central HS Facility** (60k sf) in later years to accommodate long term growth (2030+)

### Disadvantages

- Transformational renovation of Swinburne & Sunnybrook does not fully alleviate capacity issues
- **Large capital investment** required to implement workplace standards in existing space
- Renovations may cause more disruption for employees
- **Maintenance expenses** remain when reutilizing existing buildings
- Single large new facility may not adapt to growth trends of clientele

## 20 Yr. Regional Outreach *Scenario 5 (20 Year)*

- **Capacity issues alleviated at centralized campus**
- **Improved service delivery at existing Regional Sites**
- New space supports **future service delivery goals**
- Addition of parking deck at centralized campus
- **New Human Services Regional Sites as county grows and clients move**
- Renovation of Swinburne to support workplace standards
- Exit Sunnybrook facility

- **Large capital investment** required to build new public health building
- **Renovation of Swinburne does not alleviate capacity issues at a heavy cost**