CORPORATE REAL ESTATE'S EVOLVING ROLE
Supporting Employee Health and Wellness

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# AGENDA

1. **PERSPECTIVE | IMPORTANT AND RELATED STUDIES**
   - Global Trends, Employee Impacts & Scientific Analysis

2. **THREE KEY ELEMENTS | HEALTH & WELLNESS PROGRAMS**
   - Strategy - Program Management
   - Capital Initiatives - Program Development
   - Operating Initiatives - Program Operations

3. **NEXT STEPS**
   - Where Impacting & Why Matters
   - Engaging Topical Expertise
   - Q&A
5 GLOBAL TRENDS are driving investments in workplace health & wellness

1. **EMPLOYEES ARE LIVING LONGER**
The average life expectancy for both men and women has increased by 2 years since 2005
   

2. **BUT THEY’RE LESS HEALTHY**
Worldwide obesity has nearly doubled since 1980


3. **KEY SKILLS ARE HARD TO FIND**
80% of employees say wellness programmes would be crucial to attracting and keeping them over the next ten years

   Source: CNG, 2014

4. **AWARENESS OF STRESS AND MINDFULNESS IS GROWING**
79% of people say that balancing private and professional commitments is a cause of stress

   Source: CNG, 2014

5. **TECHNOLOGY IS MAKING IT EASIER FOR PEOPLE TO MANAGE THEIR HEALTH**
$70bn: The size of the market for wearable health management technology by 2025

   Source: IDTechEx, 2016
INCREASED PRODUCTIVITY

The average impact of 4.88% productivity improvement is equal to a $20 PSF/yr savings over the occupied portfolio.

DECREASED SICK DAYS

The average impact of 2.9 fewer sick days is equal to $5 PSF/yr savings over the occupied portfolio.
Harvard & CBRE: Cognitive Impact, Healthy Buildings
10 Buildings in 5 Markets

COGNITIVE DOMAIN

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<tr>
<th>Basic Activity Level</th>
<th>Applied Activity Level</th>
<th>Focused Activity Level</th>
<th>Task Orientation</th>
<th>Crisis Response</th>
<th>Information Seeking</th>
<th>Information Usage</th>
<th>Breadth of Approach</th>
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SCORE*
CORPORATE REAL ESTATE'S EVOLVING ROLE
Supporting Employee Health and Wellness
STUDY PARTICIPANTS

211 Respondents

66% End Users

MAIN INDUSTRIES REPRESENTED

Technology 25%
Financial Services 23%

ROLE IN ORGANIZATION

Head of CRE&F 48%
Yrs. Experience 20+ 70%

GEOGRAPHY

North American Based 83%
Global Span of Control 49%
Americas Span of Control 36%
**CRE&F’S ROLE TODAY**

- Little to None', 8.0%
- Takes Direction Only, 12.6%
- Implementation Vehicle, 36.8%
- Leads Enterprise Program, 8.0%

**CRE&F’S FUTURE**

- Expect CRE&F’s Engagement in Health and Wellness to increase, 91%
- Organizations are focused on Health and Wellness, 89%
- HR-led Wellness Program, 61%

*Over half* of CRE&F Organizations are Implementers of another LOB’s vision. This is closely followed by *a third* who serve as Strategic Partners to company-wide programs.
THE WELL BUILDING STANDARD™
A Seven Year Process With Continuing New Developments

WELL v1.0

Medical & Science Research

Feedback From Pilot Projects

Feedback From Peer Reviews

7 CONCEPTS | 102 FEATURES

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“Health and Wellness is no longer an afterthought but instead a very deliberate element of the workplace being built into decision making as early as the site selection stage”

-Julie Whelan, Head of Occupier Research America

58% Favor buildings that have strong accessibility and commute convenience

45% Favor buildings that have access to outdoor space and a connection to nature
2 | CAPITAL INITIATIVES | BY THE NUMBERS

Where respondents are focused in workplace design and construction
% of respondents, descending by prevalence

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What workplace design and construction initiatives are being implemented by CRE&F teams *Submitted by study respondents*

- Adding elements of wellness into site selection activities (in addition to sustainability certifications)
- Building and/or upgrading gyms, health clubs and wellness clinics
- Installing bike racks
- Renovating mother’s rooms
- Selecting ergonomic furniture (e.g. sit-stand desks)
- Pursuing LEED™ certified buildings
- Implementing the WELL Building Standard™
- Selecting environmental friendly construction materials
- Designing floorplans to increase ease of employee communication and flow
- Measuring environmental quality of workspaces - including materials selections, daylighting, HVAC, and acoustic considerations
Right to Light
75% of desks (regularly occupied seats) are within 7.5 meters of an atrium or window with views to the exterior. LED light harvesting fixtures automatically adjust based on exterior conditions.

Fresh Air
Fresh air louvres penetrate building façade to facilitate fresh air intake. Base building air handing units are equipped with MERV 13 filters to increase particle filtration

Sound Masking
Sound masking and ceiling tile upgrades in open workstation areas ensure employee comfort and minimize noise distraction. Acoustic felt walls and full height partitions in meeting rooms block sound transfer.

Beauty and Design
Integration of artwork, sculptures and biophilia to interior spaces in entrances and lobbies

Serving Sizes – Dinnerware
Dishware provided encourages appropriate serving sizes, i.e. plates no larger than 24 cm (9.5 inches) in diameter

Active Furnishing
100% of workstations feature an adjustment option to allow employees to stand while working.

Drinking Water Promotion
Water bottle filing stations, treated with carbon filters are located within 30m of all regularly occupied areas to promote hydration.
“Increasingly, occupants are being offered access to amenities that help them sustain at work the healthy lifestyle choices that many have incorporated into their personal routines”

-What’s trending in health and wellness best practices in the corporate workplace?, CBRE Research

Active Design

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<td>59%</td>
<td>31%</td>
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Buildings that encourage greater physical movement of users through stairs, facilities that support exercise and programs that encourage walking.

Activity-Based Design

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<td>68%</td>
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Space that encourages employees to utilize multiple areas around the office depending upon their varied tasks at hand.
### OPERATING INITIATIVES | BY THE NUMBERS

**Where respondents are focused on workplace and workforce support**

% of respondents, descending by prevalence

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3 | OPERATING INITIATIVES | APPLICATION

What workplace and workforce support initiatives are being implemented  Submitted by study respondents

- Operating gyms, health clubs and wellness clinics
- Implementing green cleaning standards
- Managing a bike share program
- Changing food options and vendors
- Offering fitness challenges, yoga classes, mental relaxation and group meditation
- Ensuring adequate access to light, clean water and air
- Providing nutrition consultation
- Implementing non-smoking campuses
- Applying calorie notifications to all food served
- Providing ambulance with trained paramedics on site 24/7
Well@Work

The EMEA Workplace Resources team, in partnership with HR, are committed to improving the health, wellbeing and productivity of all occupants.

Core to Success

1. Developing a menu of wellness facilities, products and services; allowing flexible deployment to suit location, occupants and budgets – we’ll look at some of these in the next slide

2. Partnership with CRE & HR; wellness cannot be driven by CRE alone, it is heavily dependent on HR policy, partnership and organisational culture

3. Work with your Landlords; successfully requesting additional wellness facilities and services; either as part of ongoing relationship or at lease renegotiations

4. Communications and branding; created an awareness campaign using a consistent identifier to show care for employee well being and reinforce value of CRE team
NEXT STEPS | WHY WELLNESS MATTERS

- Measure of success
- Improvement identified

**Improvement identified**
- Improved Health Screening Results: 18% improvement, 35% identified
- Reduced Absenteeism: 19%, 48%
- Increased Retention: 25%, 48%
- Increased Engagement: 47%, 65%
Q&A + NEXT STEPS | ENGAGING TOPICAL EXPERTISE

CBRE SME’S | HEALTH & WELLNESS

• Environmental Sustainability: Dave.Pogue@cbre.com
• Workplace Wellness Program Strategy: Emily.Neff@cbre.com
• WELL Building Standard™ Certification Management: Laci.Hoskins@cbre.com
• Occupier Research: Julie.Whelan@cbre.com

Sample Studies / CBRE Thought Leadership on Wellness
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APPENDIX

CATALOGUE OF ALL GRAPHS (18)
Industry Role

- **End User**: 66%
- **Service Provider**: 27%
- **Other**: 8%
- **Economic Developer**: 0%
Appendix - Respondent

Industry Sector

- Technology: 25%
- Financial Services: 23%
- Other (please specify): 17%
- Business Services / Consulting: 10%
- Manufacturing / Industrial: 7%
- Construction: 3%
- Utilities: 2%
- Architecture/Design: 2%
- Hospitality / Entertainment: 2%
- Real Estate: 2%
- Retail: 1%
- Government: 1%
- Telecommunications: 1%
- Aircraft / Aerospace: 1%
- Furniture: 0%
- Transportation: 0%
- Distribution: 0%
- Automotive: 0%
- Economic Development: 0%
Appendix - Respondent

Best Match to Current Title

- Head of CRE&F: 48%
- Regional or functional service line leader of CRE&F: 31%
- Regional or functional service line manager: 10%
- Other (please specify): 10%
Appendix - Respondent

Personal Geographic Base

- North America: 83%
- Asia Pacific: 13%
- EMEA: 5%
- South/Latin America: 0%
Appendix - Respondent

Level of Professional Experience

- 26+ years: 53%
- 25-21 years: 17%
- 20-16 years: 14%
- 15-11 years: 9%
- 10 years and under: 7%
Appendix - Respondent

Geographic Scope of your Organization

- 49% Global
- 36% Americas
- 12% APAC
- 8% Individual country/countries (please specify)
- 5% EMEA
Description of your Organization’s Current Level of Focus on Employee Health & Wellness

- Somewhat focused: 49%
- Highly focused: 40%
- Neutral / not sure: 6%
- Not an area of focus: 5%
Appendix – Program Management / Structure

Functional Area That Leads Employee Health and Wellness Initiatives

- **HR**: 61%
- **CRE&F**: 19%
- **Other (please specify)**: 11%
- **There is a team dedicated to this program**: 7%
- **Sourcing**: 4%
- **Leadership is distributed between the functions**: 0%

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Specific Role of CRE&F in Supporting Employee Health & Wellness Initiatives within the Broader Organization

- CRE&F only focuses on health and wellness initiatives within its purview: 37%
- CRE&F has a meaningful seat at the table in formulating employee health and wellness programs: 35%
- CRE&F takes direction from other teams leading these efforts: 13%
- CRE&F leads the firm’s overall strategy for employee health and wellness programs: 8%
- CRE&F plays little to no role in these initiatives: 8%
- Not applicable: 0%
Appendix – Program Management / Structure

Strategy & Planning

Organizational-level strategy for employee wellbeing (i.e., business led)

- Not considering: 13
- Under review: 16
- Pilot Implementation: 11
- Broad Implementation: 28
- Adopted as Standard: 17

CRE&F strategy or goals aimed at supporting employee wellbeing (i.e., CRE&F led)

- Not considering: 13
- Under review: 26
- Pilot Implementation: 13
- Broad Implementation: 19
- Adopted as Standard: 14
Appendix – Program Development / Capital Initiatives

Site Selection Criteria

- Building accessibility (e.g., walkability) commute convenience
  - Not considering: 11
  - Under review: 13
  - Pilot Implementation: 3
  - Broad Implementation: 27
  - Adopted as Standard: 31

- Access to outdoor space / connection to nature
  - Not considering: 15
  - Under review: 20
  - Pilot Implementation: 5
  - Broad Implementation: 27
  - Adopted as Standard: 18
## Building Design Standards

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0% 20% 40% 60% 80% 100%
## Occupier Experience & Amenities

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Appendix – Program Maintenance / Operating Initiatives

Facilities Management

- Enhanced cleaning protocols
- Air quality / temperature management

Chart Title

- Adopted as Standard
- Broad Implementation
- Pilot Implementation
- Under review
- Not considering
Order of Importance to your Organization (Low = Greatest importance).

- Corporate philanthropy: 4.9
- Corporate sustainability: 4.6
- Employee health and wellness: 4.1
- Professional development programs: 4.1
- Innovation programs: 4.0
- Corporate diversity and inclusion: 3.7
- Talent attraction programs: 2.7
Appendix – Program Management / Measurement

Effects of Health & Wellness Initiatives

- Improvement in Employee Engagement (via surveys, etc.): 65%
- Increase in employee retention: 48%
- Reduction in absenteeism: 48%
- Anecdotal evidence, observations, discussions: 46%
- Improvement in employer-provided health screening results: 35%
- Not applicable: 15%
- Other (please specify): 11%
Appendix – Program Management / Measurement

Where Success Has Been Identified

- Improvement in Employee Engagement: 47%
- No quantifiable results achieved: 27%
- Increase in employee retention: 25%
- Reduction in absenteeism: 19%
- Not applicable: 18%
- Improvement in employer-provided health screening results: 18%
- Other (please specify): 8%
Anticipated Level of Engagement by CRE&F Team in 1-2 Years

- Somewhat increase: 53%
- Significantly increase: 38%
- No change: 9%
- Somewhat decrease: 0%
- Significantly decrease: 0%
Appendix – Program Elements / Practices

Description of CRE&F Leading Practices Implemented

- Created health clubs at certain locations and have changed food vendors. Installed bike racks and participated in funding the bike share program.
- Yoga classes
- Implementation of mother's rooms - meant to retain more female associates (law firm environment)
- Fitness center led by outside consultant and nutritionist.
- We have focused attention on ergonomics.
- Internal fitness centers, mindful activities, group meditation, healthy food options, etc.
- Well Building Program
- "Ergonomic furniture (e.g. sit stand desks)"
- LEED Certification"
- Provide Nutrition Consultancy to the Employees on a regular basis.
- Sit/Stand desks for all employees. Very popular and well used.
- Better attention and detail to space from lighting to layout to increase communication, choice of work location, and flow.
- Non Smoking Campuses
- Health Surveillance
- Space layouts, options, ergonomics, employee engagement of the space, workplace strategy
- Calorie notification on café food, upgraded on site health and medical facilities, ALS Ambulance with trained paramedics 24x7 on site etc.
- Creation of New Work Environments for increasing numbers across campus - sit-to-stand desks, unassigned spaces, ergo support on seating, healthy building initiatives, LEED Gold selection and cleaning standards, daylighting, etc.
- Occupational health run a number of initiatives each year - walk for well being, know your numbers
- Setting up new office standards in order to increase collaboration and well-being - construction "green offices" by using environmental friendly construction materials in order to improve the overall comfort level in the office (AQI, climate, lighting,....) Created a Global Wellness Manager role and creating strategy and action plans plus we have implemented this year a global fitness reimbursement program for all full time employees
- Customized health and fitness classes by site
- These will be a part of what is implemented at the new HQ location.
- Gyms and Clinics at every campus
- Integrating wellness programs and initiatives into site selection activities in addition to just green building certifications.
- Integrated physical and mental wellbeing initiatives
- Establishing an in-house health center
- Environmental quality of work spaces including materials selections, lighting, HVAC, acoustic considerations