**To: Management Team  
From: Sarah Gort  
Re: Recommendation for future office space lay out   
Date: 4.23.12**

**When staff was asked to select between a very open office plan, a traditional office plan or a hybrid, the majority selected a hybrid.**

* 4 of 22 or 18% prefer a fully open office
* 11 of 22 or 50% prefer a hybrid approach
* 6 of 22 or 27% selected more than one option - i.e. A/B. The majority of the explanations put these folks into the hybrid category. Many people liked the idea of a fully open space but did not think that would work for CompassPoint.
* XXXX did not respond because she is leaving
* Between 9 – 11 of the 22 stated they would like a private office
  + I included XXXX in the private office headcount due to job function
  + I am recommending that our two finance staff share a slightly larger private office, these two staff positions are 2 of the 9 that requested a private office

**I believe we can and should go with hybrid approach. The primary reasons I believe we should go in this direction are:**

1. Because I believe that in pursuing the hybrid option , we can create an open, airy work place that is a desirable place to work
2. Because having staff self select a work space that best aligns with their personal work style, supports our commitment to creating a strengths based office place
3. Because creating a work environment that moves away from the traditional representations of hierarchy, supports our commitment to shared leadership in the organization
4. Because I believe that in pursuing the hybrid option, we can create a space that brands CompassPoint as a modern, professional, forward-thinking organization

**So what does this space look like? :**

* Approximately half of the staff work in private offices and half the staff work in an open space, depending on personal work style and preference
* People are able to self select if they would like a private office or if they would prefer a desk in the open office space, depending on which work space best aligns with their personal work style and preference
* In the open space, everyone has as their own desk, their own computer, and some locking storage space
* Folks are able to, and have some room to, personalize their work space
* There are space dividers, breaking up work stations and areas, but there are not traditional cubes
* The open office space has direct access to the window line
* You can hear co-workers talking here and there, but it is not an overly raucous environment
* There are several areas and opportunities to informally interact with your co-workers: couches, coffee/tea station, lunch area, etc.
* Private offices have access to natural light and some or all of the office walls are glass
* There are 4+ private rooms that folks can retreat to when their work requires private conversations, focused quiet time, or team meetings

**If we are unable to give folks their first choice in work space we will need system of to how we will assign work space to individuals. I believe we should have three criteria that are reviewed in making the determination. They are:**

1. Personal Work Style
2. Job Function ( i.e. does the person’s role in the organization require many private meetings or require that they work closely with a team)
3. Tenure

**Two questions we need to answer if we pursue this option:**

In this scenario is the CEO in a private office or open space?

Do the CEO and Practice Director need larger offices to easily accommodate meetings?