

Capital COVID Snapshot and the Future of Work

Results from September 2021

January 18, 2022



**GREATER WASHINGTON
PARTNERSHIP**

FROM BALTIMORE TO RICHMOND
FOSTERING UNITY
ADVANCING GROWTH



Agenda

What is the Greater Washington Partnership?

What is the Capital COVID Snapshot?

What is the Back to Work Barometer?

What might the Future of Work look like?

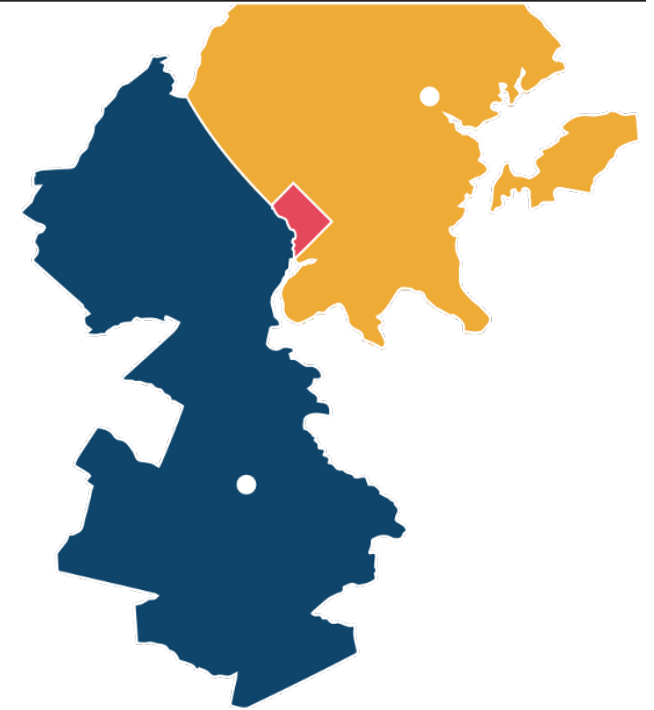
THE CAPITAL REGION FROM BALTIMORE TO RICHMOND



Our region has great diversity, tremendous assets, and immense potential. We have an intertwined economic future and our ability to thrive depends on the success of us all.

The super-region of Maryland, Virginia and the District – from Baltimore to Richmond – is the 3rd largest economy in the US and the 7th largest in the world.

The Partnership is uniquely positioned, with a broad coalition, to understand the gaps and identify goals across the Region, to track specific progress against those goals, and to catalyze solutions that benefit us all.



115

federal labs and
federally-funded research
and development centers



46%

of the population 25
years+ hold
Bachelor's degree or
higher



184

languages spoken;
175 international
embassies

FORTUNE
1000

53

Fortune 1000 companies
headquartered in
MD, DC, VA



4

significant airports,
two major shipping
ports



OUR BOARD MEMBERS

The leadership and employees of our partner companies drive our agenda to catalyze solutions at pace and scale for the region.

We bring long-term perspectives and fact-based solutions to drive impact.

We give back to our community and foster a truly inclusive economy that creates opportunity for all.

OUR BOARD EMPLOYS MORE THAN 230,000 PEOPLE IN THE CAPITAL REGION



01. MODERNIZE INTERCITY AND COMMUTER RAIL

ACTION 1.1

Streamline planning and secure funding for projects that remove bottlenecks limiting the rail system's speed, frequency, reliability, and growth

RECOMMENDED NEXT MOVES

- ▶ The Capital Region's congressional delegation should work with the FRA to streamline environmental review processes for both Union Station and Long Bridge
- ▶ Amtrak, in partnership with MDOT and the congressional delegation, should identify its funding strategy to replace the B&P Tunnels, including federal and state funds
- ▶ MDOT should work with Amtrak and the Capital Region's congressional delegation to secure funding to expand rail capacity at BWI Airport
- ▶ Virginia and the District should work with the congressional delegation to secure FRA and FTA grants to expand and enhance Long Bridge
- ▶ The congressional delegation should secure flexibility for Amtrak and state DOTs to use local and targeted hire preferences for these projects

ACTION 1.2

Create a redevelopment compact to expand and modernize Union Station; redevelop Baltimore Penn Station and Staples Mill Station

RECOMMENDED NEXT MOVES

- ▶ Amtrak, VRE, MARC, WMATA, and the private developer should agree to recommendations for a federally authorized redevelopment compact
- ▶ Baltimore Penn Station's master developer should coordinate with public stakeholders to complete a visionary station development plan and move to construct projects starting in 2020
- ▶ Amtrak, Virginia, and Henrico County should complete a Staples Mill Station redevelopment plan and secure funding to redevelop the station building

ACTION 1.3

Create a seamless commuter rail network by expanding and integrating MARC and VRE services

02. IMPROVE ROADWAY AND TRAIL PERFORMANCE

ACTION 2.1

Expand and coordinate the region's highway performance-driven toll lane network

RECOMMENDED NEXT MOVES

- ▶ The Capital Region should apply the Partnership's performance-driven tolling principles to all future toll roads and when modifying existing toll facilities
- ▶ Public agencies should conduct robust and broad public engagement to develop goals, performance metrics, and public benefit assessments for each tolling project
- ▶ Maryland should establish regionally coordinated performance-driven tolled lanes on segments of I-495 and I-270 and apply revenues to key corridor enhancements
- ▶ Congress, supported by the Maryland congressional delegation, should direct the National Park Service to lease the federally owned segment of the Baltimore-Washington Parkway to Maryland
- ▶ MDOT and the BMC should study the implementation of a performance-driven tolling system on the Baltimore Beltway and I-97

ACTION 2.2

Investigate a system to charge drivers entering the Washington metro area's most congested central business districts

RECOMMENDED NEXT MOVES

- ▶ DDOT and Arlington County, in consultation with MWCOG, should study and make recommendations on the feasibility of decongestion pricing zones in the Washington metro area
- ▶ DDOT and Arlington County should provide a report and recommendations to MDOT, VDOT, and MWCOG within 12 months on the feasibility of a decongestion pricing zone

ACTION 2.3

Complete the Baltimore Greenway Trails Network and Capital Trails Network, and establish a Richmond trail network strategy

03. CREATE HIGH-PERFORMING PUBLIC TRANSIT

ACTION 3.1

Increase the speed and reliability of Baltimore's transit system while establishing a bold vision for an expanded system

RECOMMENDED NEXT MOVES

- ▶ MTA, in partnership with elected officials and stakeholders, should create the region's long-range transit plan to improve the existing transit system and prioritize investments to further expansion of rapid transit service, including in key corridors such as the Route 40
- ▶ MTA, Baltimore city, and the area's counties should deliver ready-to-go projects while the plan is being developed, including projects to improve the BaltimoreLink system
- ▶ MTA should increase transparency and public reporting of real-time performance metrics for its bus and rail systems, including on-time performance by route and time of day

ACTION 3.2

Optimize Washington's bus network and enhance coordination of the metro area's public transportation options

RECOMMENDED NEXT MOVES

- ▶ The region's transit providers, MWCOG, MDOT, DDOT, Virginia DRPT, and NVTC should establish a new committee to coordinate service and fares across all public transportation systems in the Washington metro area
- ▶ WMATA should coordinate with local jurisdictions and MDOT, DDOT, and VDOT to harmonize bus service across all providers in the Washington metro area
- ▶ Local jurisdictions, MDOT, DDOT, and VDOT, WMATA and other transit providers should establish regional policies for bus priority treatments
- ▶ County and city governments should quickly complete ready-to-go bus improvement projects, such as the District's 16th Street project and Montgomery County's BRT project on US 29

ACTION 3.3

Expand rapid transit options to

04. GROW EMPLOYER MOBILITY PROGRAMS

ACTION 4.1

Challenge the region's employers to implement game-changing commuter programs to enhance talent attraction and collectively reduce congestion during peak travel periods

RECOMMENDED NEXT MOVES

- ▶ Employers that comprise the Partnership should lead the Capital Region Employer Mobility Challenge by adopting best practice and innovative employer mobility program
- ▶ Employers throughout the Capital Region should join the Partnership in the Capital Region Employer Mobility Challenge to deliver benefits for the transportation system

ACTION 4.2

Enhance the effectiveness of public commuter programs to increase their use by private employers—to complement an expanded employer commitment

RECOMMENDED NEXT MOVES

- ▶ MDOT, DDOT, VDOT, and MPOs should establish uniform performance metrics for commuter mobility programs to focus public funding on the programs and services that have the greatest impact on travel choices
- ▶ MDOT, DDOT, VDOT, and the MPOs should survey existing commuter mobility programs in the region and identify opportunities to enhance, leverage, and coordinate these ongoing activities
- ▶ MDOT, DDOT, and VDOT should deploy a bi-annual standardized employee survey at urban area worksites that employ 100 or more employees to establish a baseline and measure progress
- ▶ The region's transportation agencies should create and market discounted employer bulk transit and bike share purchase programs modeled on successful programs deployed in peer regions

05. EXPAND ACCESS TO OPPORTUNITY

ACTION 5.1

Increase density and ensure inclusive development in areas near rapid transit corridors

RECOMMENDED NEXT MOVES

- ▶ Local governments, supported by the MPOs and transit agencies, should conduct zoning and accessibility studies for each rail and high-frequency transit stop
- ▶ Maryland, the District, Virginia, and local governments should adopt economic development regulations that prioritize and incentivize inclusive TOD
- ▶ State and local jurisdictions should adopt laws requiring corridor community preservation and improvement plans be completed no less than 12 months prior to a new rapid transit corridor project opening
- ▶ Public and private employers should prioritize multi-modal access as a key factor in future job site selections—and public agencies should incentivize this development pattern
- ▶ The states, in partnership with MPOs and local jurisdictions, should use public funding to attract private resources to capitalize an Equitable Access TOD Fund

ACTION 5.2

Adopt local and targeted hiring procurement and contracting policies

RECOMMENDED NEXT MOVES

- ▶ State and local transportation agencies should adopt local and targeted hiring and contracting policies to maximize the region's return on transportation investments and ensure family supporting wages
- ▶ The Capital Region federal delegation should empower local and state governments to use local and targeted hiring practices for all federally funded transportation projects
- ▶ Community-based organizations and construction apprenticeship readiness programs should be deployed to increase job placement for local residents

06. ENABLE TECHNOLOGY-DRIVEN FUTURE

ACTION 6.1

Build regional data management system to power all technology actions and improve regional mobility

RECOMMENDED NEXT MOVES

- ▶ MDOT, DDOT, VDOT, and the MPOs should establish an umbrella open data regulatory framework and procurement standards
- ▶ MDOT, DDOT, and VDOT, in collaboration with the MPOs and large transit agencies, should develop a digital data master plan
- ▶ MDOT, DDOT, and VDOT should fund a research program for higher education institutions to study and recommend updates to the region's transportation analyses and tools
- ▶ Transportation agencies should partner with local technology companies, higher education institutions, and other technology stakeholders to train staff and search for opportunities to pool data and expertise

ACTION 6.2

Enable the creation of Integrated Mobility platforms for all public and private mobility options

RECOMMENDED NEXT MOVES

- ▶ MDOT, DDOT, VDOT, Amtrak, VRE, and the transit agencies should establish strategic goals and plans for an Integrated Mobility platform for all public and private trip planning and ticketing region
- ▶ All transit agencies and public bikeshare systems in the region should incorporate fare capping and pilot integration of their systems into a seamless payment platform
- ▶ MDOT, DDOT, VDOT, and transit agencies should pursue regional and national funding to move toward seamless ticketing across all mobility options

ACTION 6.3

Deploy regionally coordinated smart traffic signals to reduce vehicle congestion and speed up bus travel

RECOMMENDED NEXT MOVES

- ▶ MDOT, DDOT, and VDOT should fund a research program to recommend best practices for traffic signal hierarchy prioritization

07. REFORM GOVERNANCE AND FUNDING

ACTION 7.1

Measure and report the outcomes and equity benefits of each capital transportation investment

RECOMMENDED NEXT MOVES

- ▶ The DC government, RRTPPO, and BMC should establish a transparent performance-driven project scoring program to prioritize plans and make transportation investments
- ▶ MDOT should publicly review its performance-driven project scoring program (Chapter 30) after its first funding cycle to ensure it delivers the intended outcome
- ▶ WMATA should develop a transparent performance-driven project selection program that focuses on regional benefit and removes politics from significant funding decisions
- ▶ MDOT, DDOT, VDOT, MPOs, and transit agencies should establish regionally aligned performance criteria with equitable access as a primary performance measure for plans, investments, and project development

ACTION 7.2

Create a new regional governance structure for Baltimore public transportation

RECOMMENDED NEXT MOVES

- ▶ With support from the governor, elected officials, and stakeholders, the General Assembly should establish a blue-ribbon panel to recommend reforms to MTA's governance and funding structure
- ▶ The blue-ribbon panel should make recommendations to the General Assembly within 16 months regarding key issues and necessary next steps

ACTION 7.3

Increase federal transportation investments to better maintain the existing system and complete critical capital investments

RECOMMENDED NEXT MOVES

- ▶ The U.S. Congress should increase revenues raised for transportation investments, starting





First Capital COVID Snapshot: August 2020

Capital Employer Survey and Transit Tracker Key Findings



Employers are adopting a phased approach to reopening, but many remain uncertain. This fall, about one-third of the region's workforce is expected to physically return to worksites.



Of employers who had long-term reopening plans, on average, those employers expect to have 72% of their employees return to the office by Summer 2021. However, a third of responding employers are still unsure of their summer 2021 plans.



Most employers want to regularly test their employees for COVID but will not if the test costs more than \$50.



Nearly half of employers indicated a high level of concern about public transit safety and a low level of confidence that public agencies can control crowding and enforce the wearing of masks.



Metrorail ridership remains well below historic levels (85% below last year) while service, hours of operation, and frequencies are close to pre-pandemic levels, resulting in no Metro lines exceeding the social distance crowding standards on average in August, during peak periods.



Local and WMATA bus transit services generally reported smaller ridership declines compared to commuter rail and bus, but no transit agencies have reported widespread crowding issues as of August.



Some historically high-ridership bus routes are experiencing crowding above social distancing capacity at certain times of day; a standard 40ft bus has about 40 seats, but the CDC guidance on social distancing capacity limits capacity to only 10 passengers.



While crowding on the transit system is not common today, budget challenges resulting from COVID-19 will exacerbate crowding concerns should Congress be unable to provide additional aid to our region's transit network, which is expected to lead to service reductions.



Employer Survey

Key Findings



Vaccines, schools, and employee sentiment are driving reopening plans and decisions to bring employees back.



Since August, employers have delayed the phased approach to reopening their worksites by about three months.



Although very few expect their workforce will telework full time, the majority expect most of their workforce to telework 1-2 days per week after the pandemic.



Most employers (75%) are not planning to make changes to their real-estate or office footprint in the next 12 months.



Close to half of the respondents rated employee mental health, loss of collaboration, and loss of organizational culture as top areas of concern for how the COVID pandemic is affecting their workforce.



Only 1% of respondents expect most of their workforce to telework full time after the pandemic.



Most employers indicate that rapid testing and improved ventilation systems are the top solutions that can make workplaces safe in future pandemics.



The level of confidence in transit agencies' ability to provide safe transportation, limit crowding, ensure passengers wear masks, and provide sanitary vehicles has grown since August.



Capital COVID-19 Snapshot



<https://greaterwashingtonpartnership.com/capital-covid-snapshot-2021/>



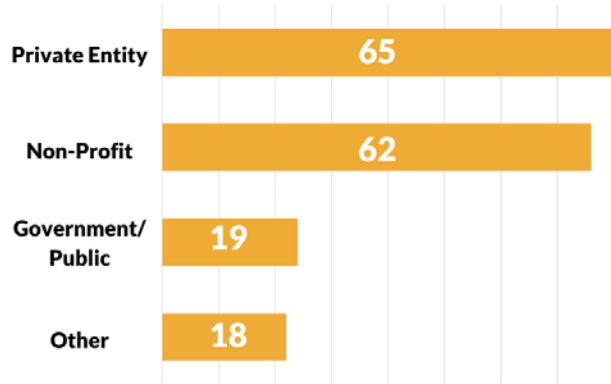
Partners for the Capital COVID Snapshot Fall 2021





Survey Sample Characteristics

Organization Type



Employers

164

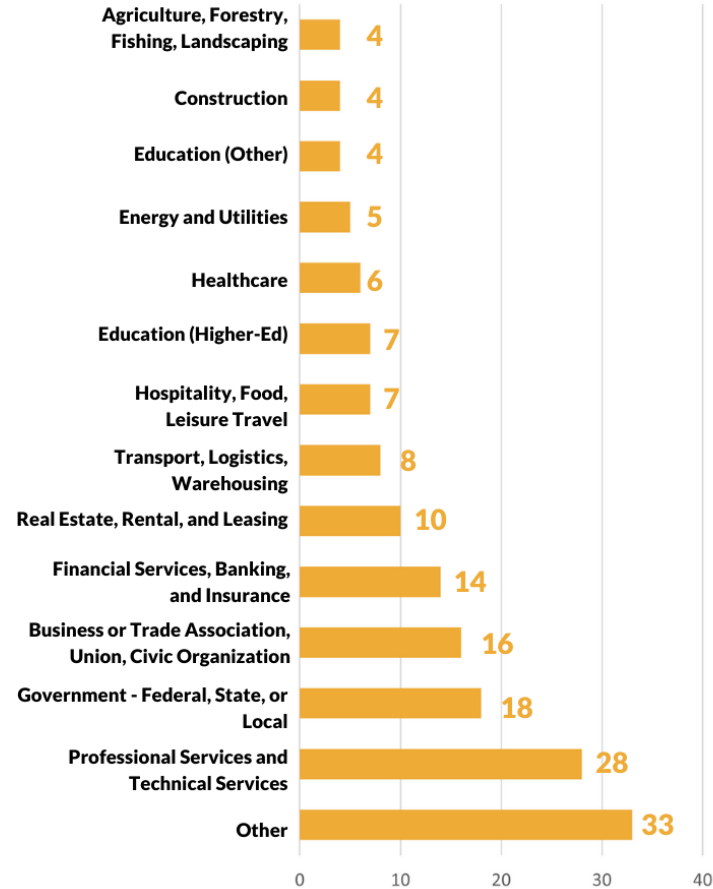
Number of Sites

~1,200

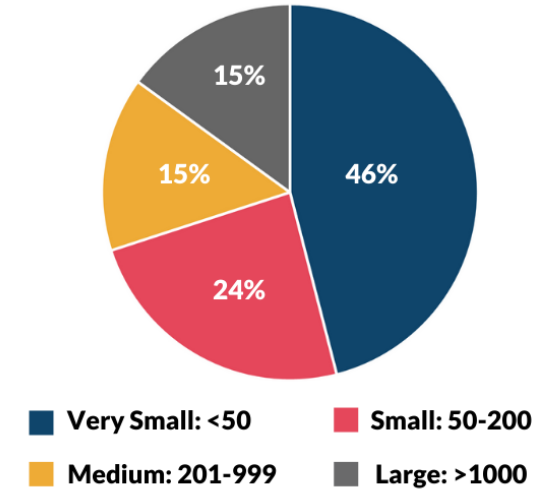
Employees

290,000

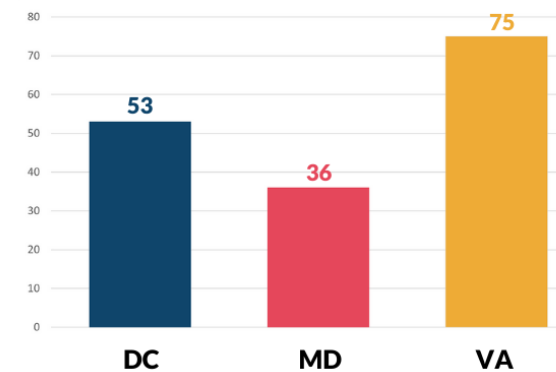
Industry Type



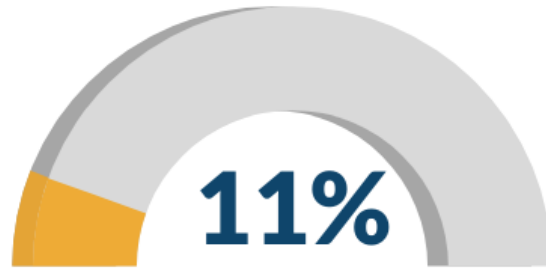
Organization Size



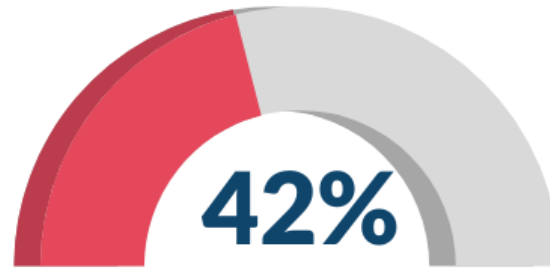
Primary Location



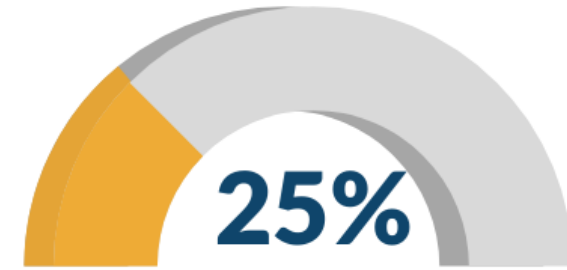
Q: This Fall 2021, most employees reporting to your primary location will...



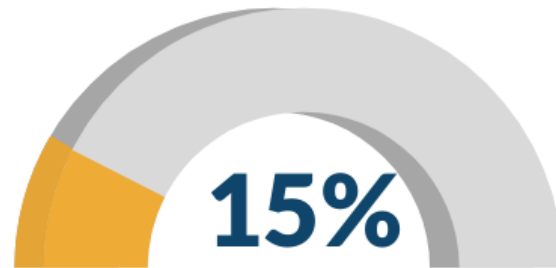
Telework full time (~100%)



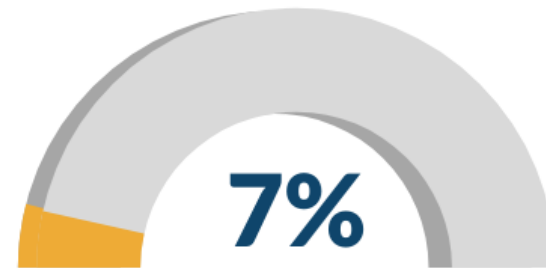
Telework most of the time (50-100%)



Telework some of the time (<50%)



Work onsite, in person

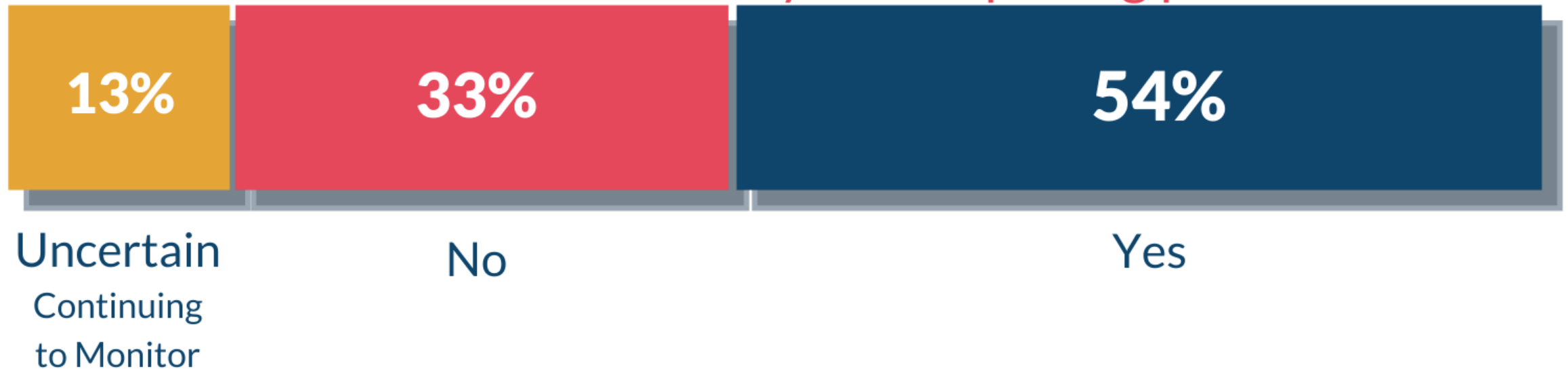


Other/uncertain

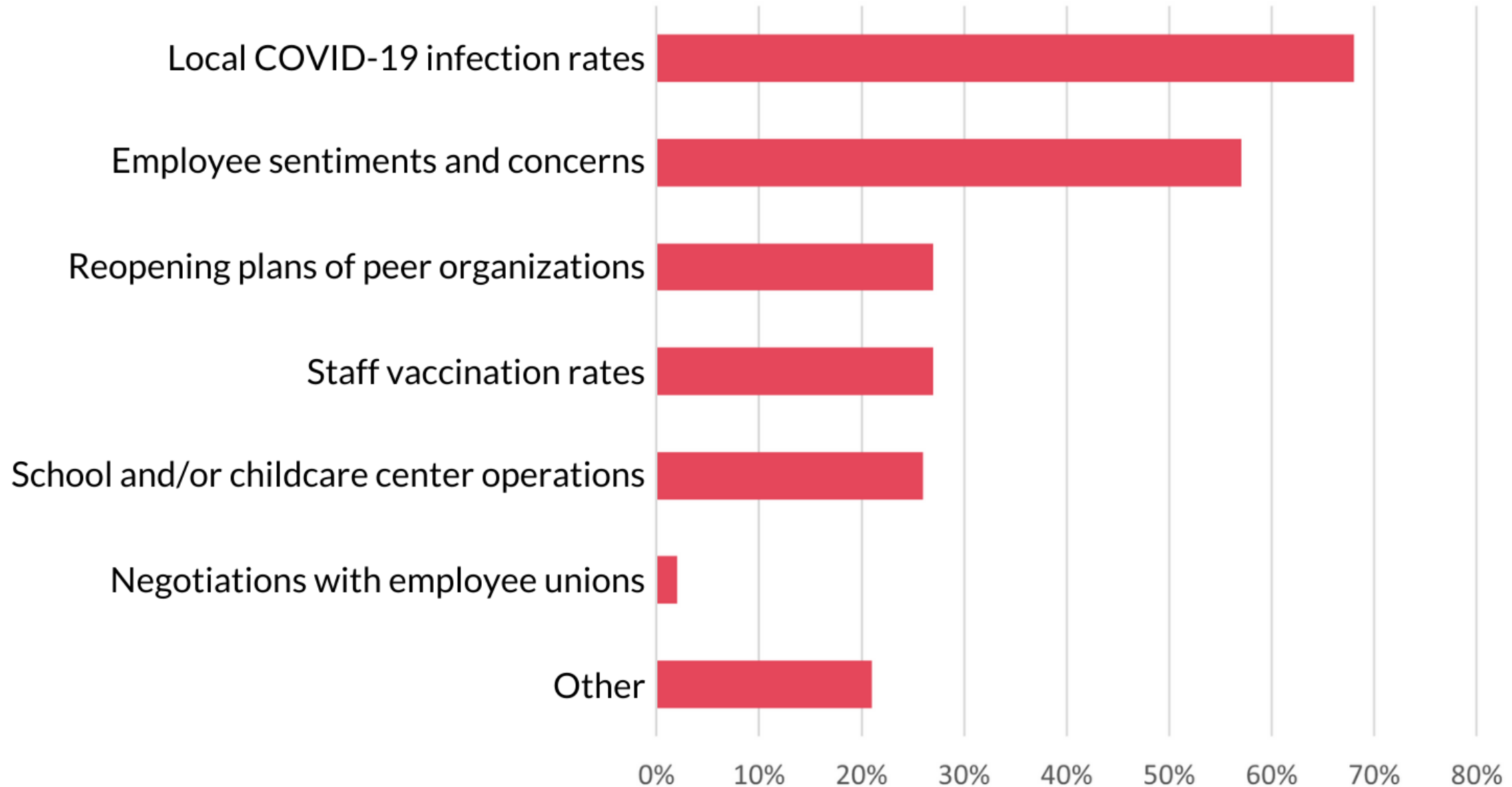
Q: Over the next 12 months, do you expect the frequency that your employees telework will...



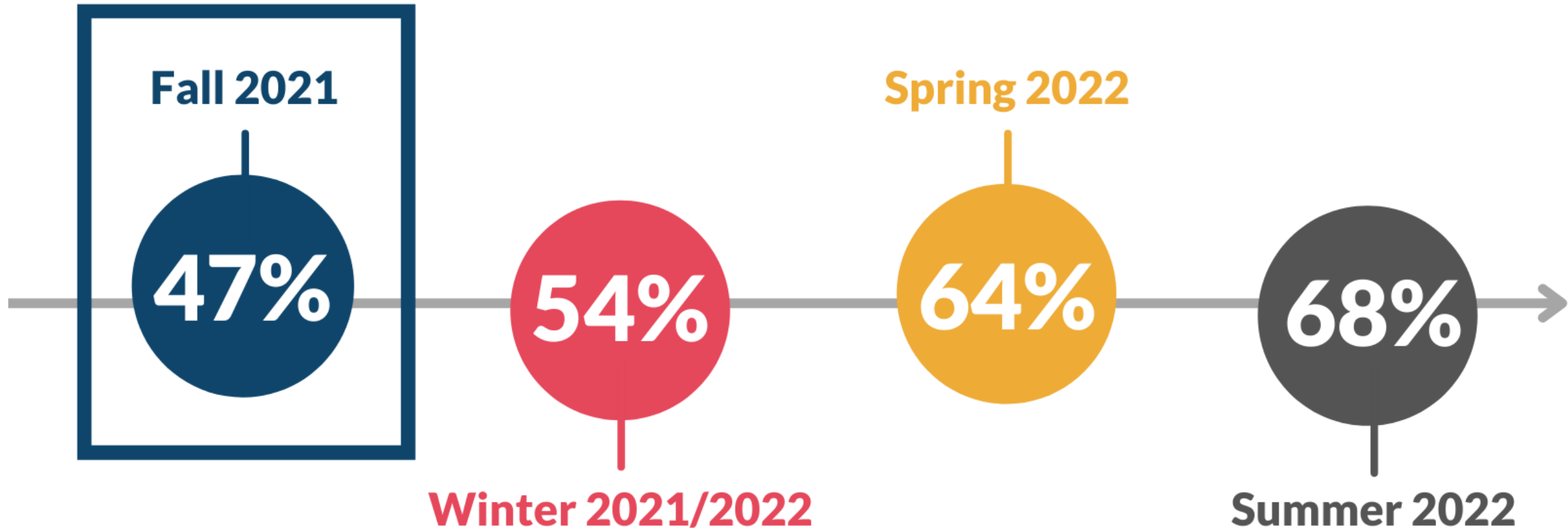
Q: Has the recent rise in COVID-19 variants and infection rates over the summer altered your reopening plans?



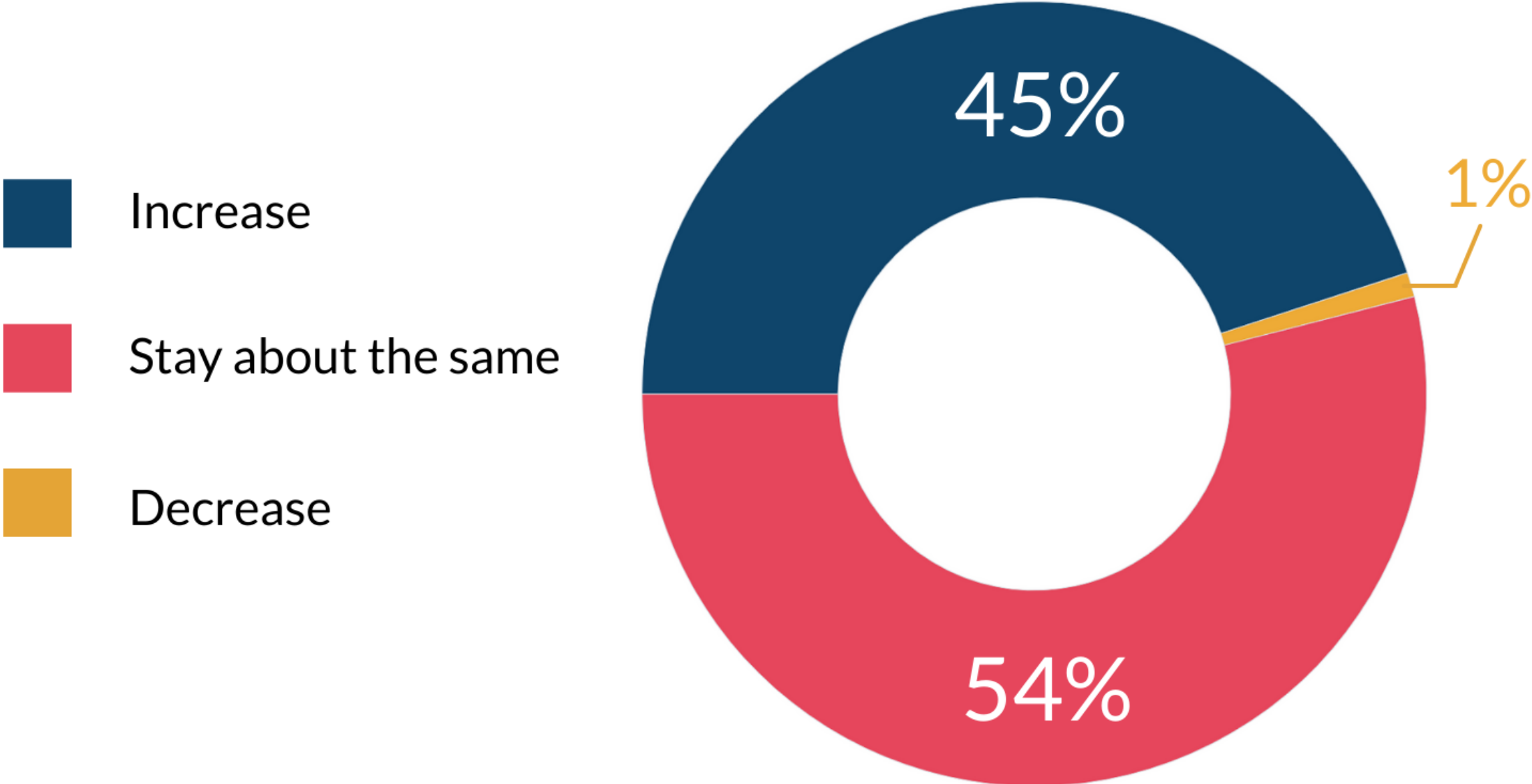
Q: Which of the following are the biggest drivers for your organization's decisions regarding when to bring employees back to worksites?



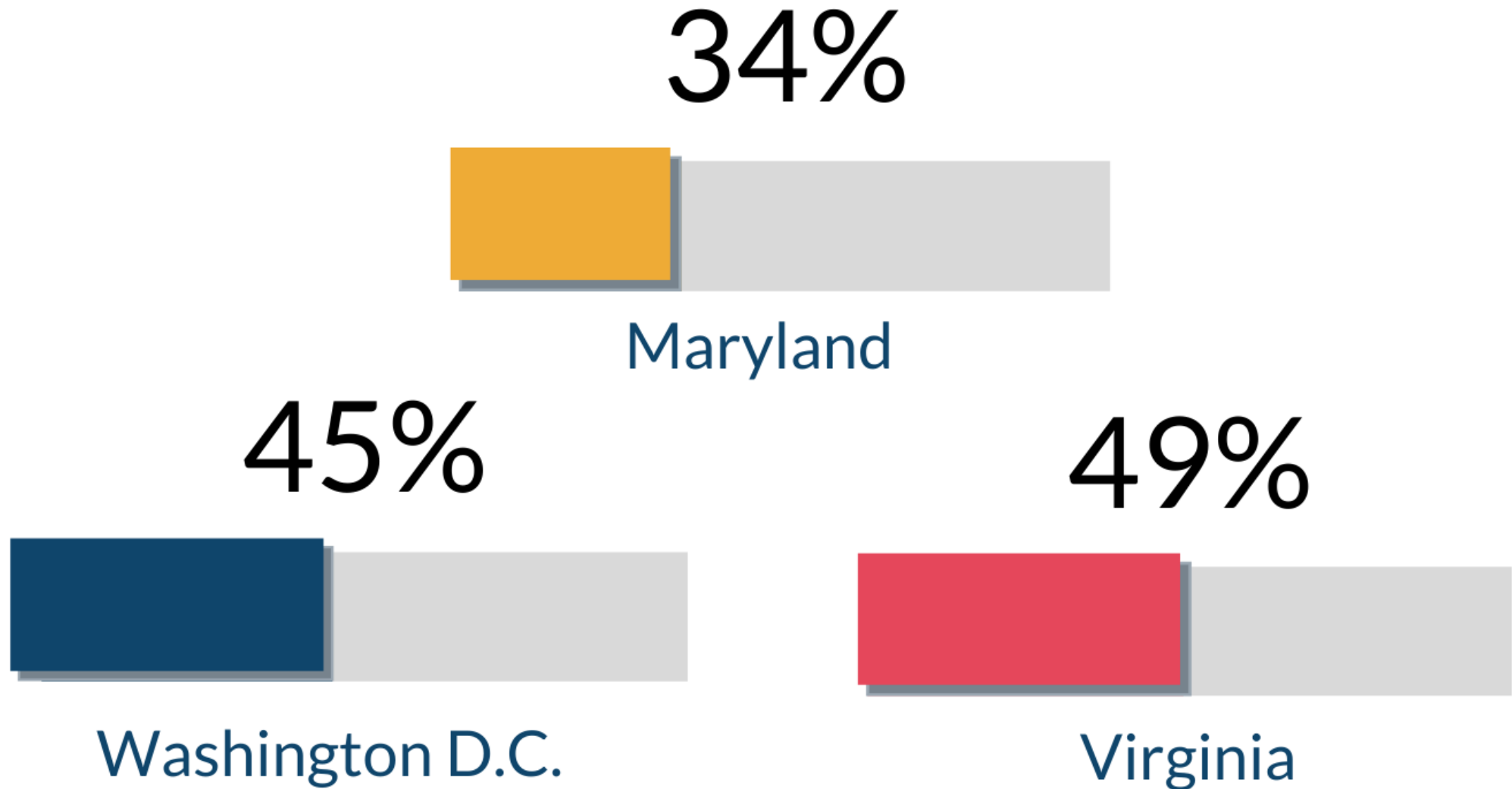
Q: What percentage of employees reporting to your primary location in the region do you expect to come onsite during a typical workday during the upcoming months?



Q: Over the next 12 months, how do you project the size of your workforce in the Capital Region will change?

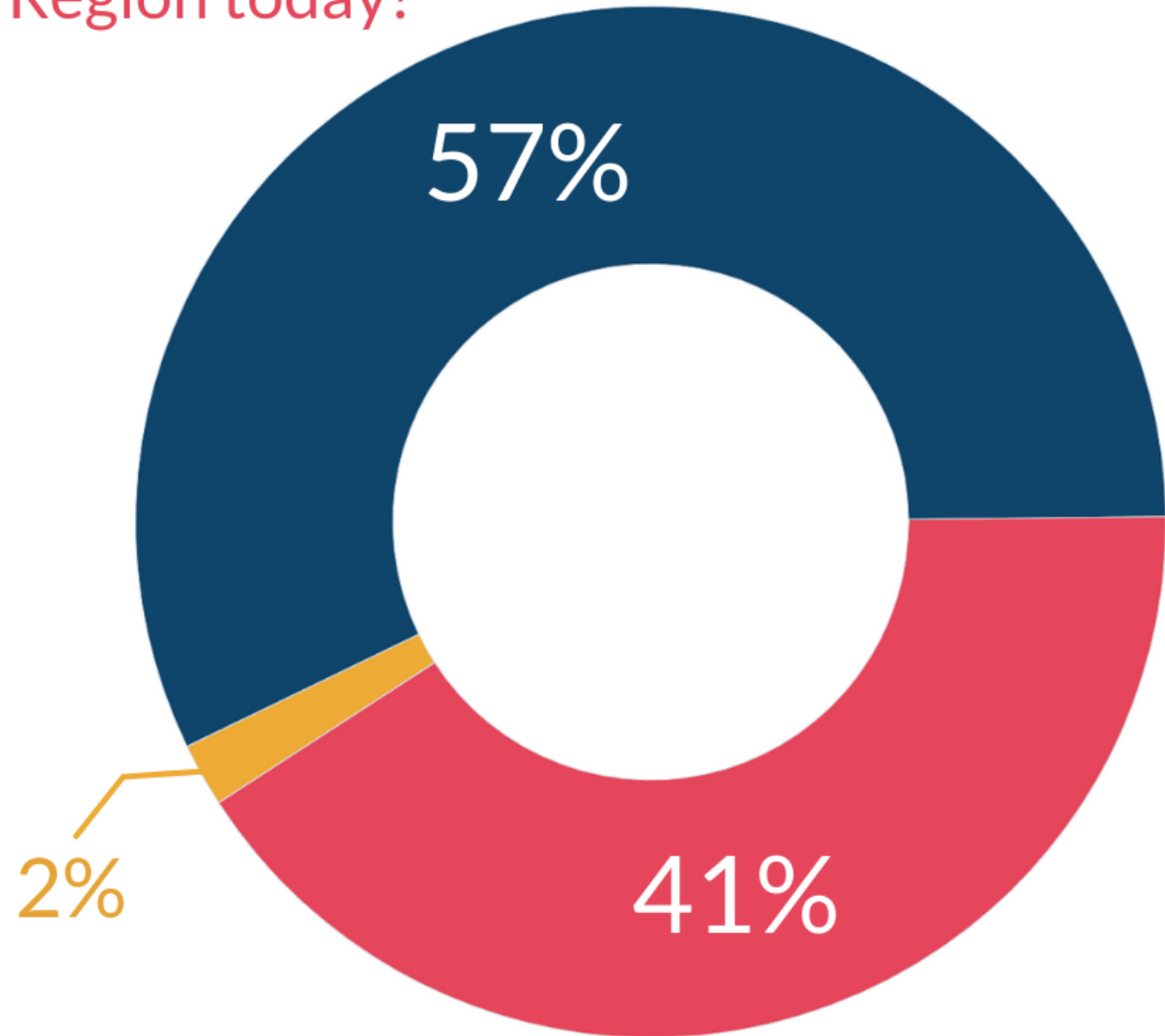


Share of employers who anticipate growing their workforce over the next year.

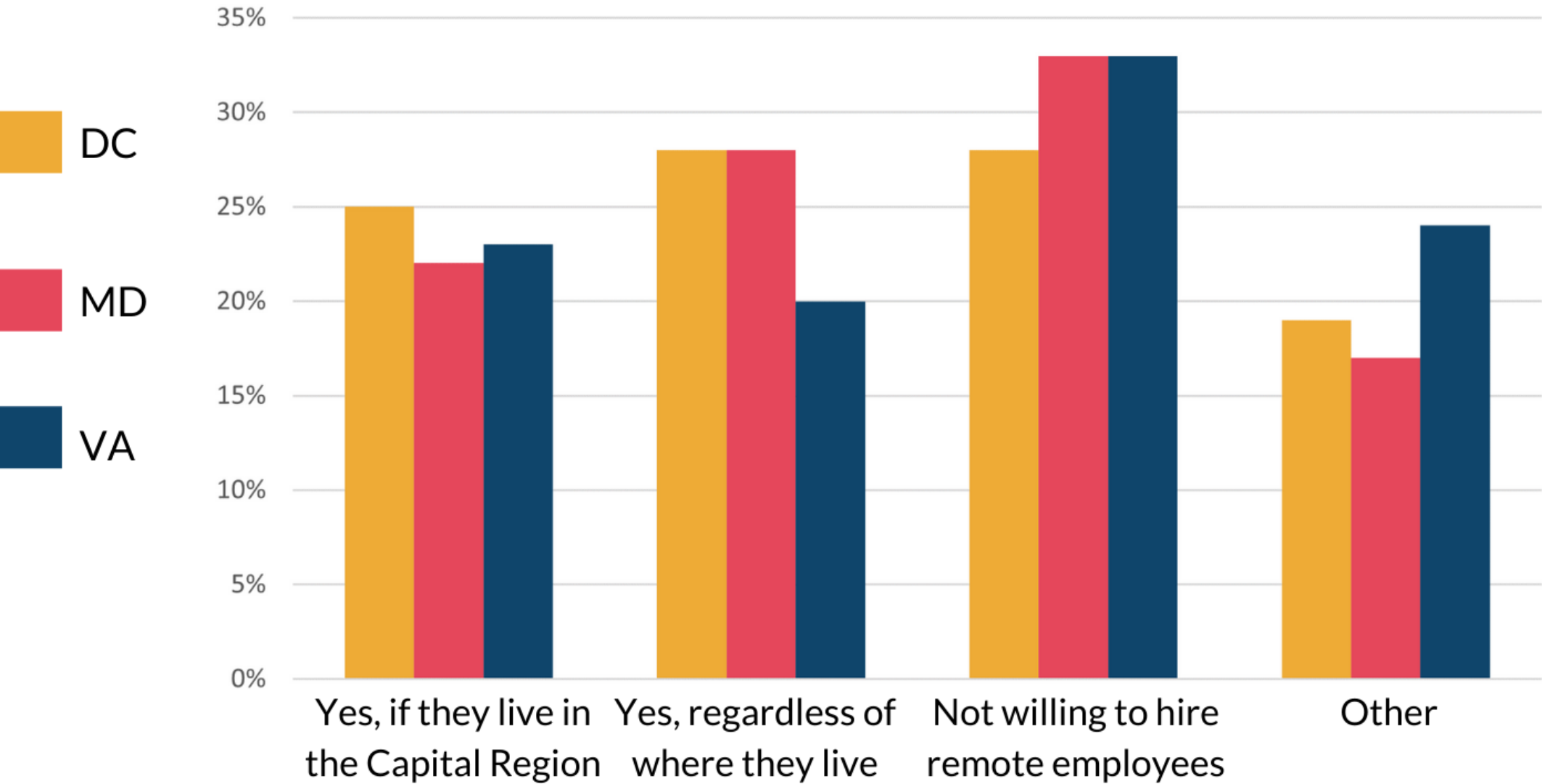


Q. Compared to hiring before the pandemic (Fall 2019/Winter 2020), how difficult is it for your organization to find qualified employees in the Capital Region today?

-  Easier to find qualified employees across the region
-  About the same
-  More difficult to find qualified employees across the region

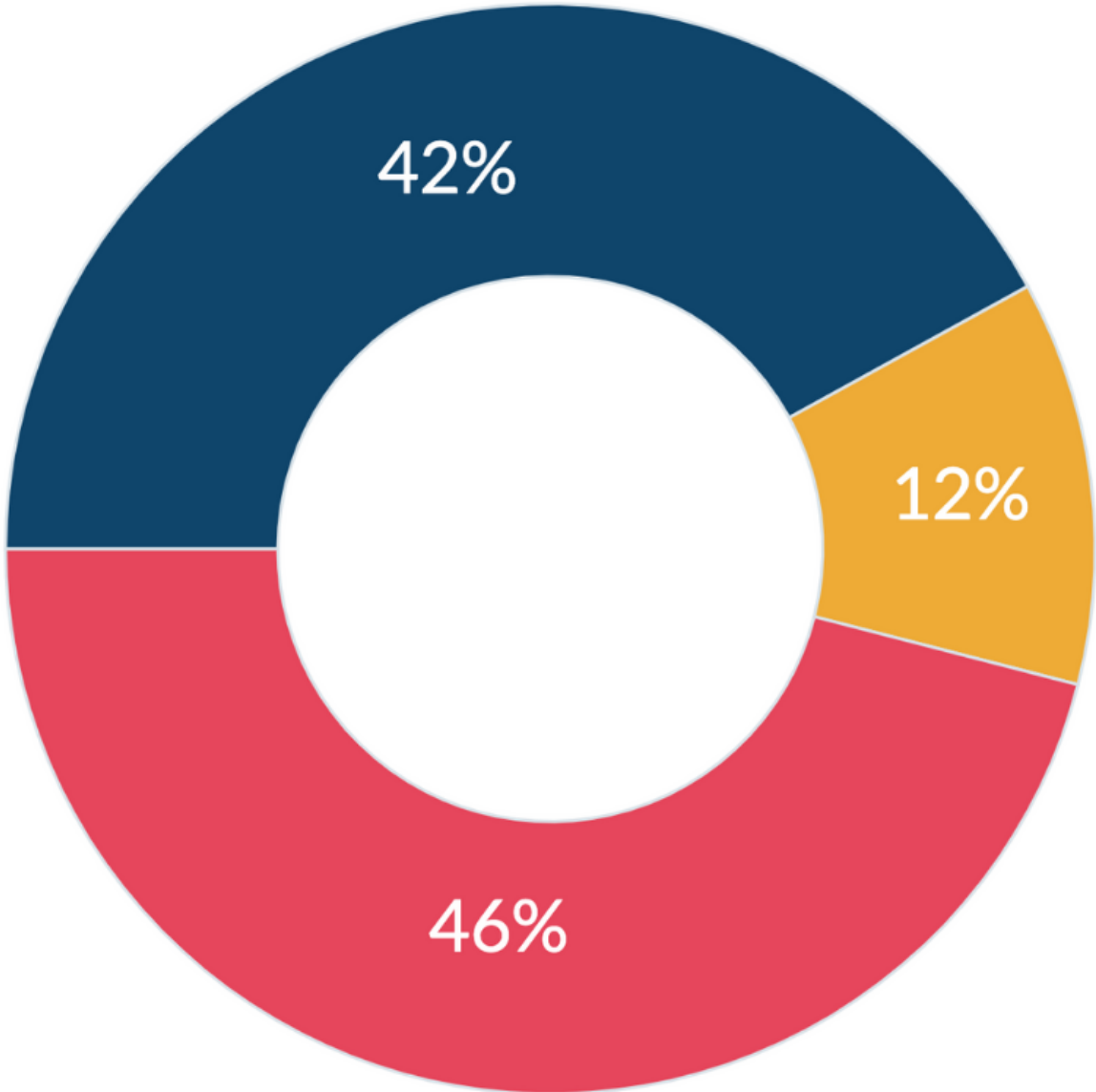


Q: For your worksites based in the Capital Region, is your organization willing to hire employees who primarily work remotely?

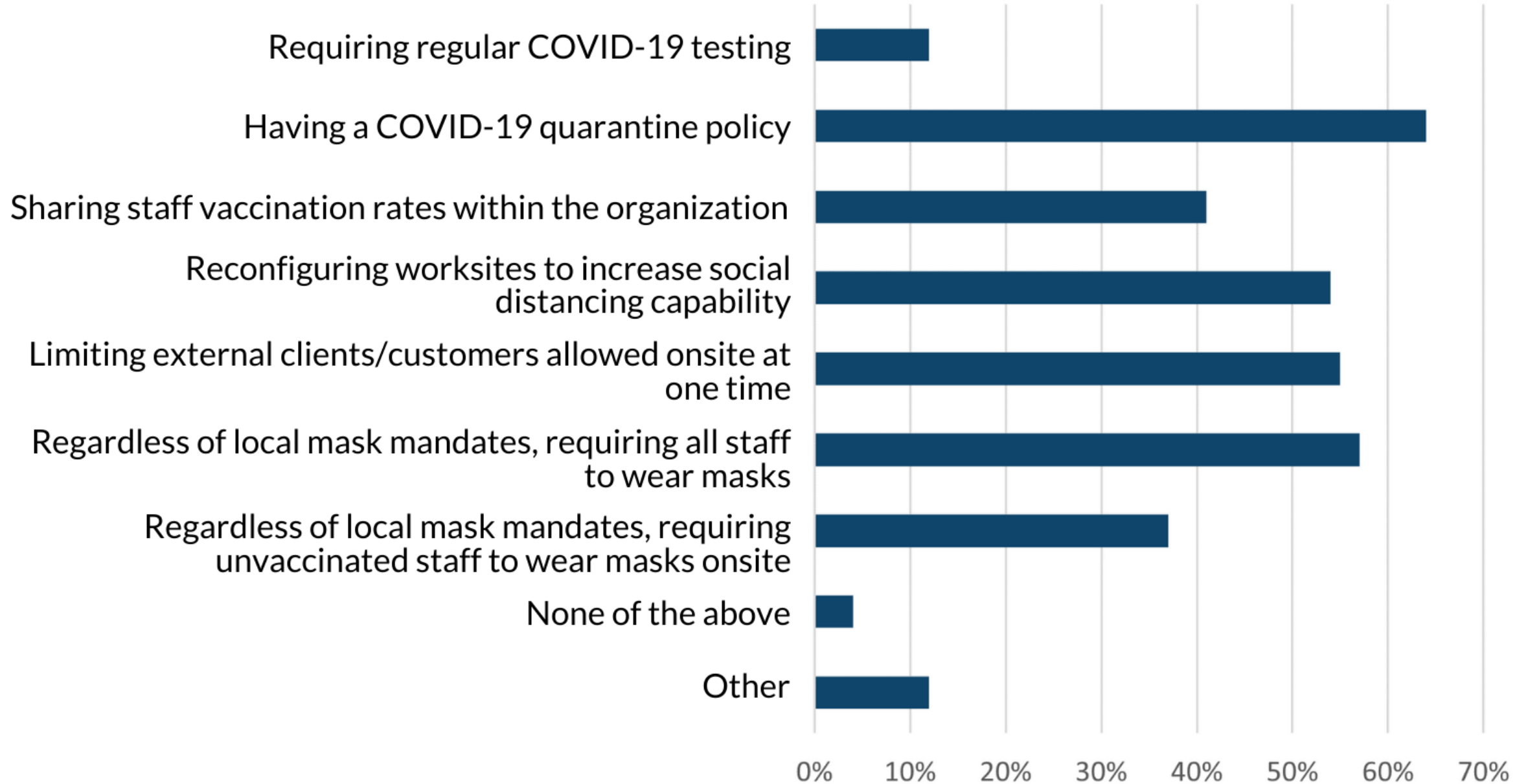


Q: Is your organization requiring employees to get the COVID-19 vaccine?

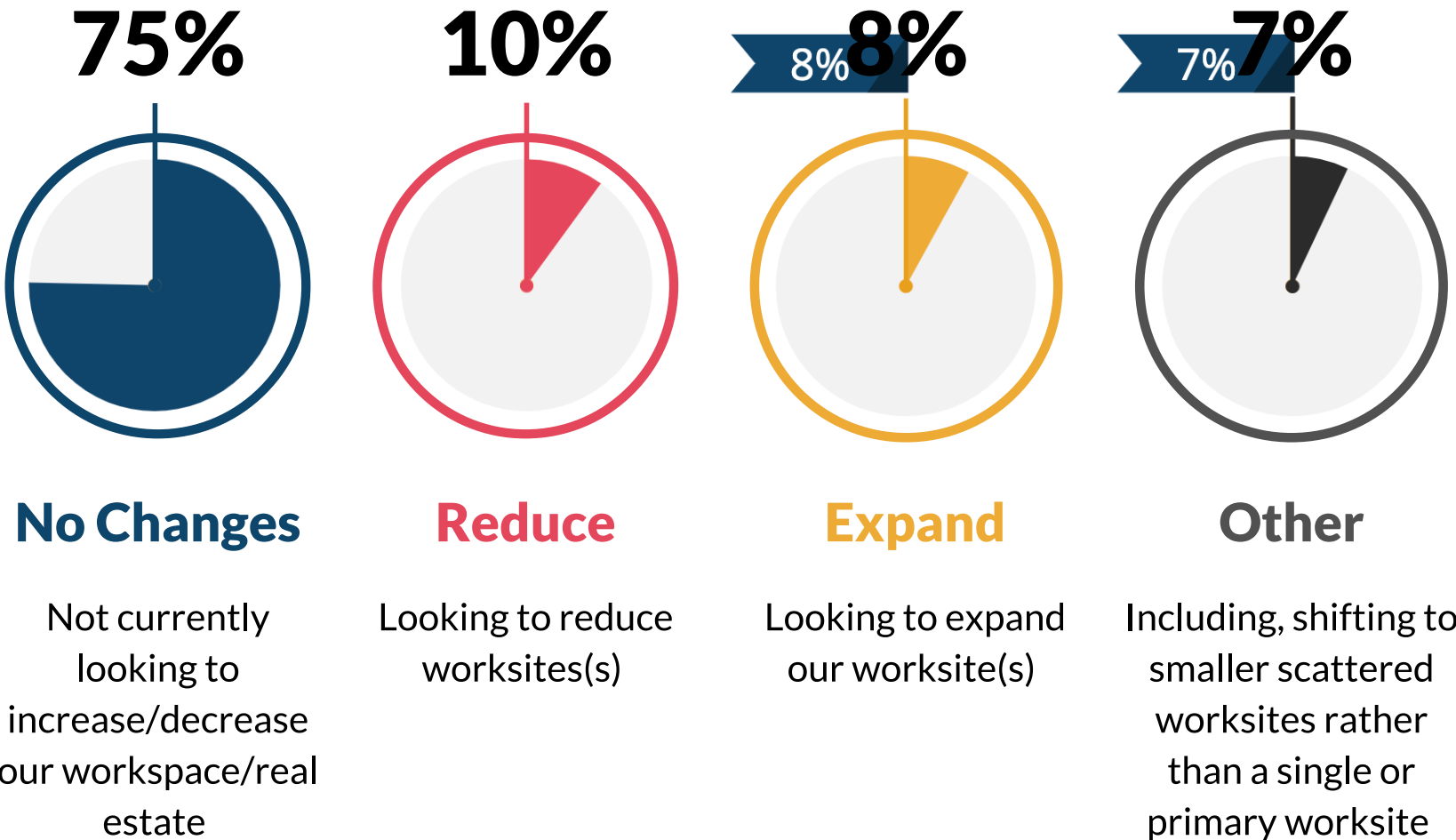
- YES, except for those with appropriate exemptions
- YES, OR employees must submit to regular COVID testing
- NO

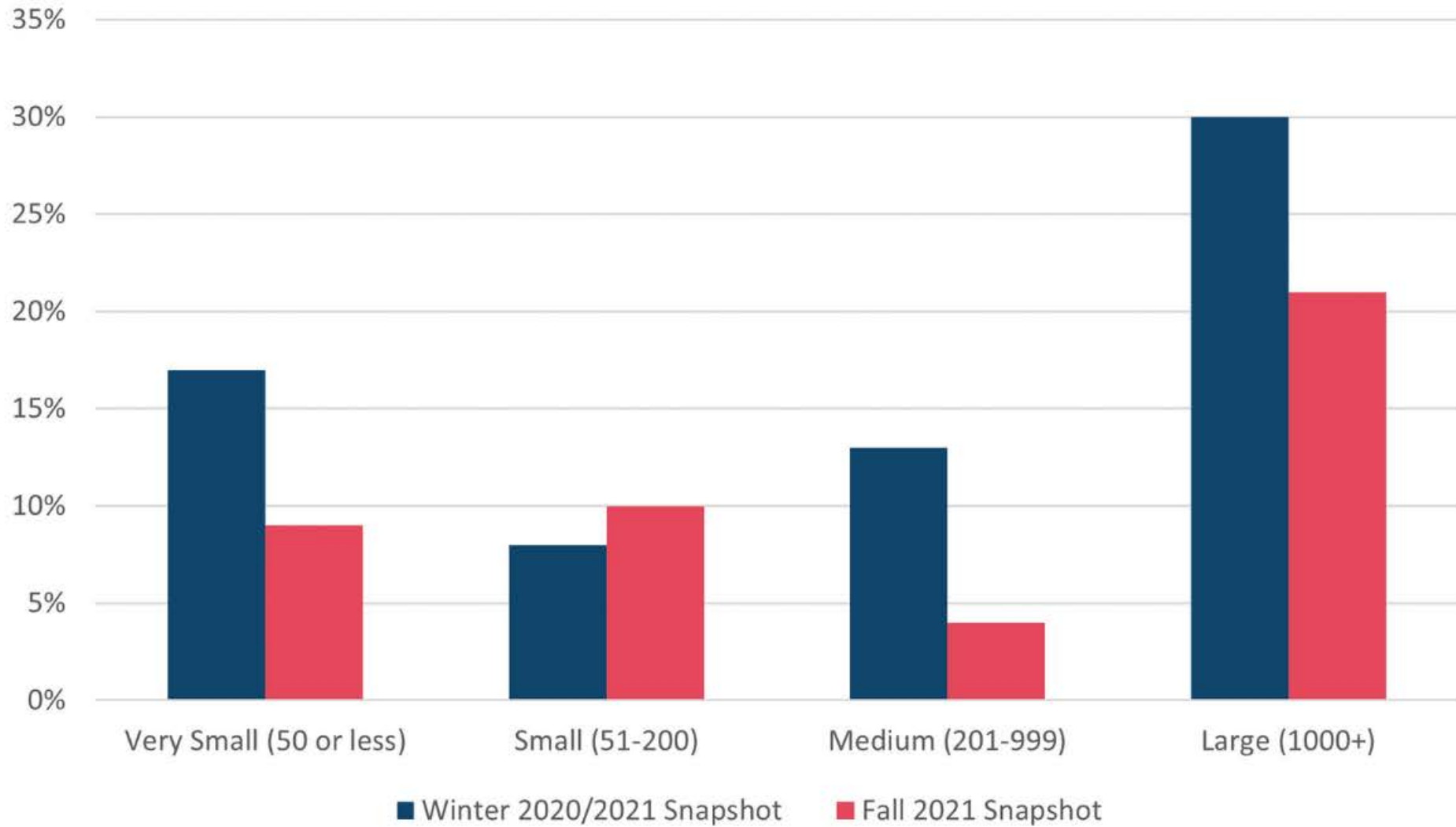


Q: If employees work onsite, which measures have you adopted to ensure employee safety and comfort?



Q: Which statement best describes your organization's plans for reducing, expanding, or changing worksites or real estate needs in the next 12 months?

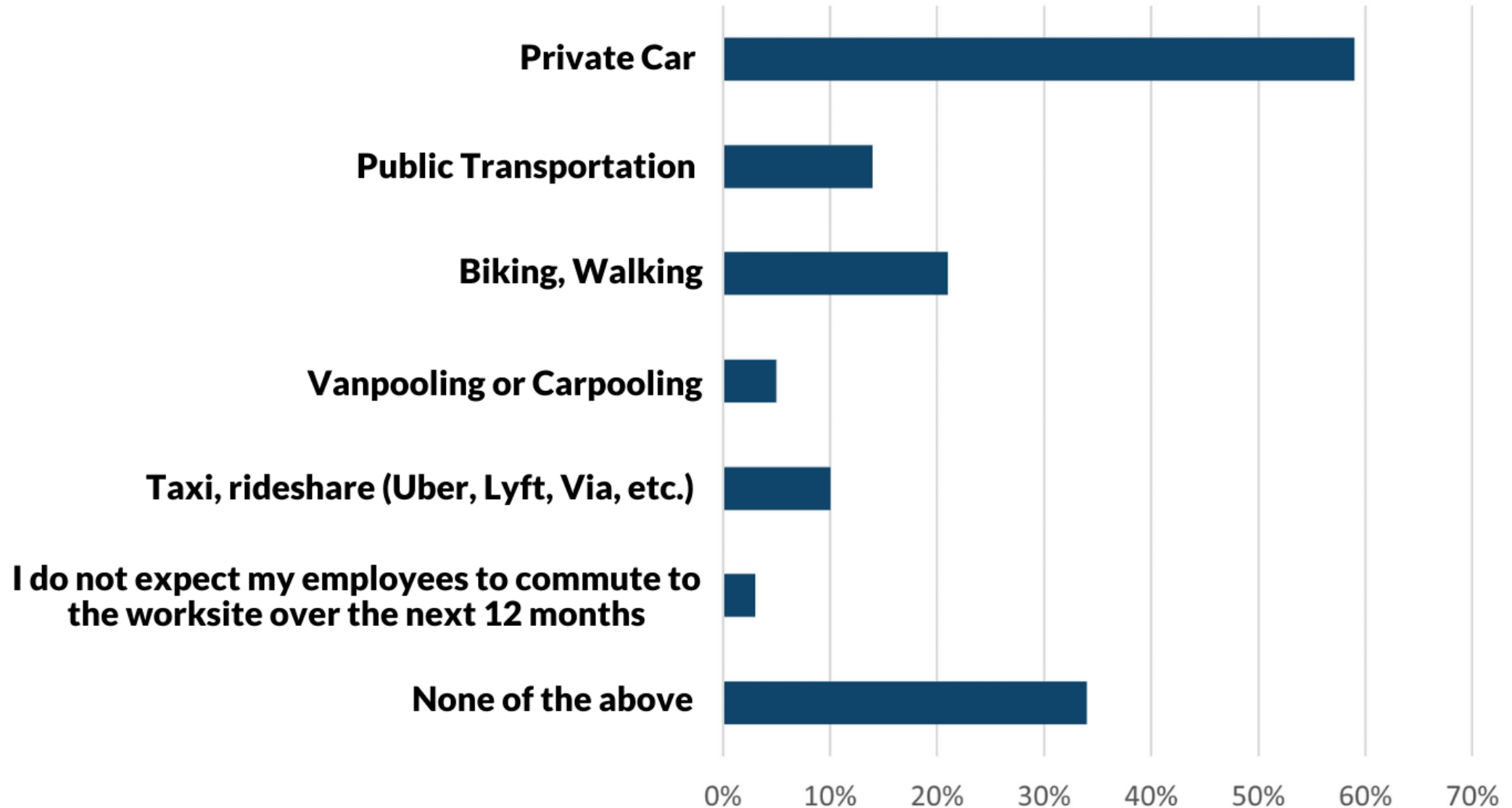




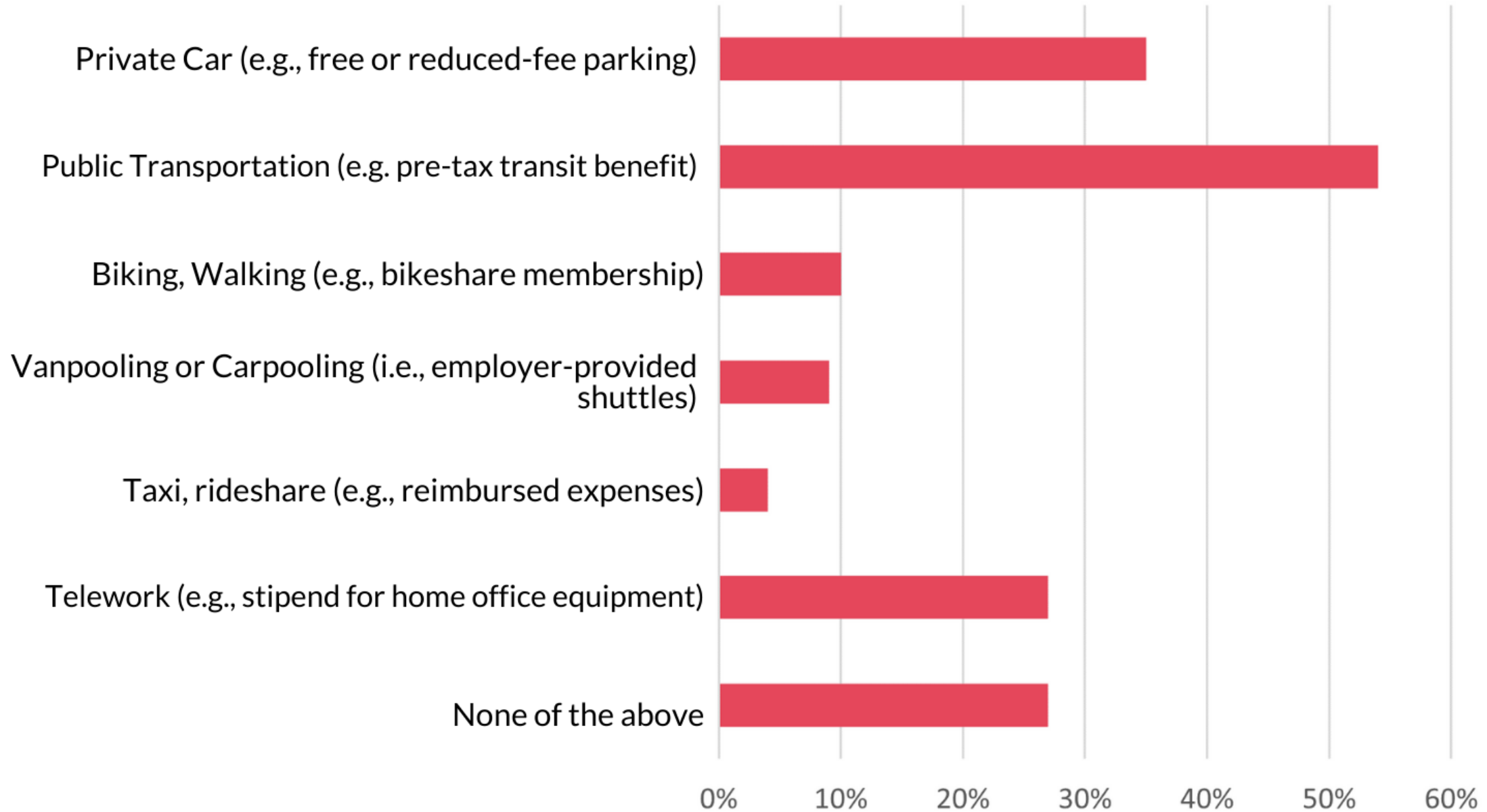
By organization size

Looking to Reduce Worksites or Real Estate in the next 12 months

Q: Compared to the period before the pandemic (Fall 2019/Winter 2020), do you anticipate that the share of your employees who commute to your office using any of the following transportation will be higher over the next 12 months?



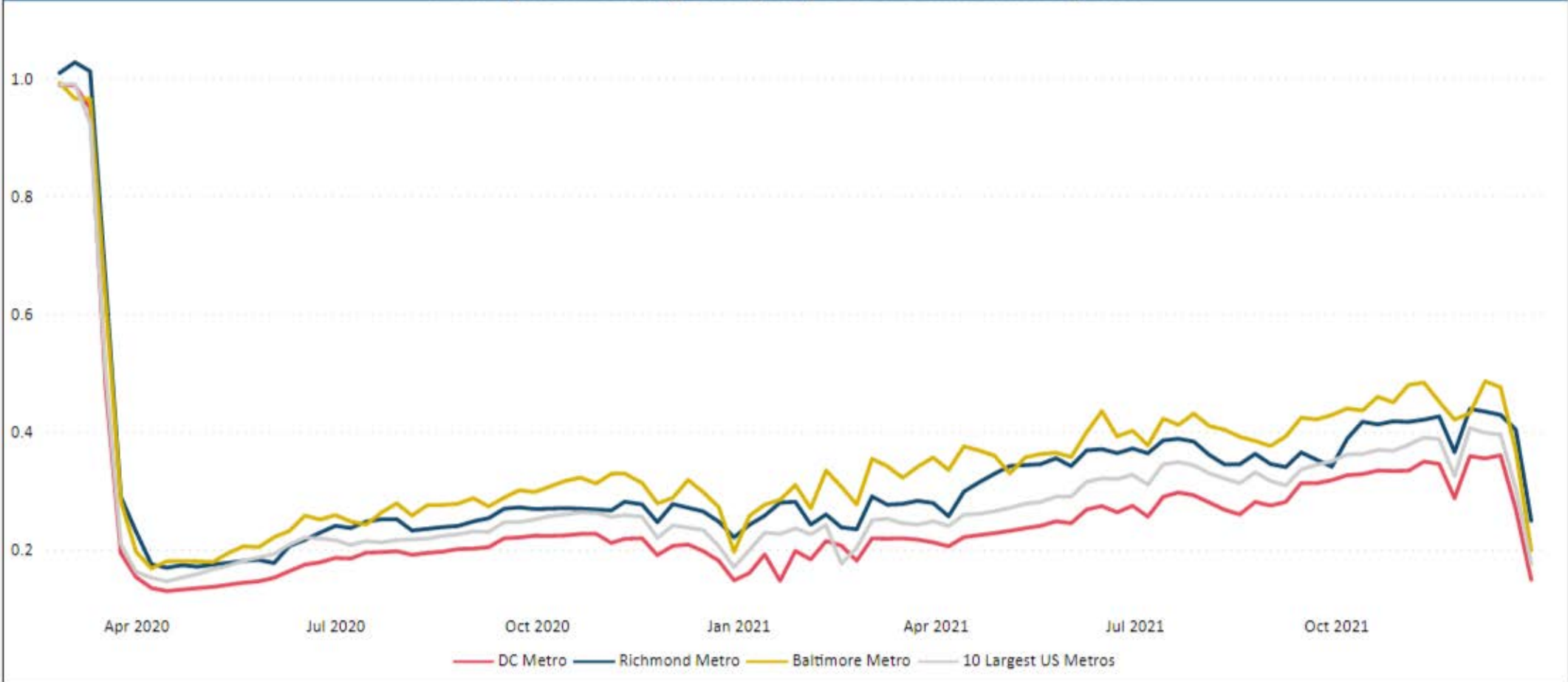
Q. Do you offer any benefits to employees for the following transportation modes?



1. The Barometer reflects daily swipes of Kastle Systems' access controls to show average occupancy across Kastle System's clients in the Greater Washington Region and how that compares with the top 10 US metros.
2. Chart based on weekly averages (exc. Federal Holidays) of unique authorized user entries relative to a Pre-COVID baseline.
3. Top 10 Metro Areas: Austin, Chicago, Dallas, DC, Houston, LA, New York, Philadelphia, San Francisco, and San Jose

Capital Region Kastle Back to Work Barometer

Kastle Systems - Average Occupancy rate of Commercial Properties



Source: Kastle Systems - Average Occupancy rate of commercial properties

Some degree of hybrid working is here to stay, but uncertainties remain in how workers and employers will respond to changing public health dynamics



Remote work in the
Capital Region remains
elevated

42%

of workers continue to
telework most of the most
time (50-100%)

Source: GWP Capital COVID Snapshot, Fall 2021

According to US Census Bureau's most recent Household Pulse Survey, the Washington Metro continues to have the highest degree of remote work in the country.

Source: US Census Household Pulse Survey, Week 39

Without the option to work from home at least one
day a week..

4 in 10

of workers who currently work from home nationally say that
they will seek another job

Source: Work from Home Research Project, October 2021

Uncertainty around the trajectory of the pandemic
is leading to..

>37%

of DC area residents remain wary of mass transit and have a
continued reluctance to return fully to pre-pandemic
activities

Source: Washington Post-Schar School DC area poll, August 2021

THANK YOU

John Hillegass

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FOSTERING UNITY. ADVANCING GROWTH.