

Property Development in Indian Country

This month, *Indian Gaming* magazine spoke with a number of leading property development companies about how their firms have adapted in order to navigate the pandemic. We also asked them to share what amenities tribes might consider re-imagining or adding in order to safely draw new customers to their properties. Here is what they had to say...

John Hinton, Director of Native American Projects
Bergman, Walls & Associates
bwaltd.com



John Hinton



NAVIGATION: It goes without saying that the presence of the pandemic has affected business across all sectors. As with our tribal gaming clients, we have adapted

by reimagining our own current operations, while at the same time, finding ways to create value for our customers, helping them to adjust to the new normal for casino gaming facilities. Our talented designers have deep knowledge of tribal gaming design and our clients' needs, and our human capital is the foundation of our own long-term business strategy.

For our tribal gaming clients, we are focusing on connecting on a monthly basis to make sure they have what they need to adapt now. While some larger projects have gone on hold as tribes evaluate and prioritize their needs, we have remained busy completing ongoing work and starting a variety of smaller operational projects from food service updates to carpet replacements to converting spaces for other functions. We are also helping them with feasibility studies and long-term planning focused on creating value-added amenities that are scalable and focused on revenue generation.

DRAWING CUSTOMERS: To safely draw customers back, properties need to minimize customer-facing interactions at every opportunity. Phones can be used for everything from hotel check-in to keyless room entry to automated beverage service. Buffets as we know them are not likely to make a comeback. We are currently engaged in an initiative to update buffets to a food hall format, comprised of local vendors selling regional or specialty foods, with distanced communal dining.

For tribal facilities with expansive properties, consideration

should be given to golf courses and RV parks. Many golf courses have seen large increases in rounds played compared to the same period last year. RV parks have been one of the most popular attractions in recent months, and can draw visitors reluctant to utilize hotels.

It is also essential to improve indoor air quality in order to ensure the safety of players and team members alike.

Brett Ewing, Principal
Cunningham Group Architecture
cunningham.com



Brett Ewing



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NAVIGATION: When the pandemic hit, Cunningham Group was able to react overnight thanks to our great IT team, who had the tools in place to quickly set up over 300 employees as we all moved to our homes. We did not miss a beat on our projects and utilized our electronic tool belt to continue conducting our design business and successfully service our clients remotely. This requires a delicate balance of technology and human interaction that we continue to focus on. We have also been fortunate that many of our tribal clients did not put their projects on hold. Part of the reason is that tribal resorts are in regional locations and markets with "drive-in" customers who do not have a lot of options for entertainment. Our tribal clients recognize this and have strategically re-opened their properties in a safe and responsible way.

DRAWING CUSTOMERS: Looking ahead, the future of entertainment outside of the gaming floor is going to be essential. I don't agree with the phrase 'new normal' as I believe this is a pivotal time in our world's history and we must re-look at many things, including 'how we gather.' Our vast Big Name Entertainment experience is helping us push forward

some pioneering ideas on where to go next with entertainment. For example, many properties have vast amounts of square footage they are unable to use right now, and it is a perfect time to re-define their uses and functions.

We have also been fortunate to work with a couple of tribes during the pandemic who have challenged the old gaming rules and standards. Together, we have flipped some norms upside down with amazing success.

Dike Bacon, Principal
HBG Design
hbg.design



Dike Bacon



NAVIGATION: HBG Design has historically been able to navigate through industry challenges in a nimble fashion – and that hasn't changed with COVID-19. Like

many professional services firms around the country, we transitioned both our Memphis and San Diego offices to a work-from-home model in response to COVID-19. We were pro-active with this decision before local government directives required it. Our primary goal was and still is to keep our staff safe and healthy. Fortunately, we had plenty of very sophisticated technological platforms and accessible infrastructure in place to move swiftly and be fully operational in a matter of days.

Regarding our tribal clients, we have been fortunate in that much of our work has continued to progress. A number of our projects have continued through planning and design phases. It seems many clients have proactively decided to continue to advance their projects and get them ready for construction when the timing is right. We also have a number of projects that were in construction pre-COVID-19 and these have continued to progress through the pandemic. A big part of this success is attributed to construction companies that implemented numerous health and safety protocols in order to keep projects on schedule.

DRAWING CUSTOMERS: We have been studying the re-design of a number of the typical resort amenities. One of the most important has been food and beverage. We think that design solutions that respond to spacing requirements and COVID-19 restrictions should be flexible and

adaptable as conditions continue to change and improve. This means more modular systems and easily modified seating arrangements that can actually create a feeling of luxury and exclusivity. The temporary re-use of existing conference and meeting space has been in recent discussions. The conference business will come back but in the interim these large spaces can creatively and temporarily be used for gaming space. Wiring, security and ingress/egress have to be addressed but it can work. In the right climates, increased outdoor activities may continue to be a very successful way to serve higher numbers of guests and keep the proper distances.

James Klas, Founder & Principal
KlasRobinson Q.E.D.
klasrobinsonqed.com



James Klas

NAVIGATION: We have seen firsthand the devastation the pandemic and associated mitigation efforts have wrought on Indian gaming and tribal economies in general. However, we have also seen numerous signs of resilience and hope as casinos have reopened to better than expected results and tribal leaders have been at the forefront of science-based efforts to protect their people and their

customers. That is why we produced our June white paper, *Healing Tribal Economies*, and our September update with more current data. Both are available from our website as free downloads. We have also developed special, lower-cost services specifically tied to the pandemic to help cash-strapped tribes, including Road to Recovery presentations and Recovery Flash Reports.

DRAWING CUSTOMERS: Looking ahead, key factors to speed the recovery in Indian gaming continue to be the proper balance between gaming and non-gaming space and amenities and enhanced focus on encouraging visits and spending by high-value gamers. We have published articles on both topics and discuss them at length in our white paper. Specifically, casino operators need to refocus space allocations in their complexes to maximize gaming space and maintain gaming position capacity, while ensuring that the customers they are attracting are their highest-value patrons.

This means that amenities and marketing efforts need to be targeted more narrowly on the most valuable gaming patrons, even if that means a loss of non-gaming business at their other amenities in the short-term. With convention business and food service options limited by public health concerns, this represents less of a loss than it would have before the pandemic. Once the pandemic is finally under control, there will likely be a shift back to more broadly focused marketing and amenities. Even then, however, we expect the more intensive focus on high-value gamers to continue. As we say in our white paper, the one thing we know for sure is that as bad as this is, tribal leaders have weathered far more severe storms throughout history and will survive the current crisis to continue to protect their cultures and their people.

**Christopher Urhahn, Associate
& Senior Project Manager**
TBE Architects
tbearchitects.com



Christopher Urhahn



NAVIGATION: As an architectural firm with hospitality and gaming projects throughout the U.S., we travel a lot – to jobsites, meeting with clients, and a variety

conventions. In March of this year, our travel and face-to-face interactions came to an abrupt stop. Suddenly, we found ourselves cut off from both current and potential clients.

Fortunately, our team of architects and designers have been using “net meetings” to coordinate with owners, contractors, and specialty consultants for years, so increasing the frequency and depth of those meetings was not a foreign concept. Our airline travel and client exposure has been significantly reduced, visiting job sites in person to conduct the contractual on-site requirements of “observation” as the fiduciary for the tribe. When conducting business, everyone follows the standard health and safety guidelines (mask and distancing), which makes it challenging to pick up on subtle facial expressions and body language that we rely on for feedback.

With concerns about health, it has been challenging to establish new connections that were once abundant at conventions like NIGA, OIGA, and G2E. While we participate in a whole host of virtual conferences, webinars, and zoom meetings, we really haven’t found any substitute that can match the efficacy of live gatherings.

DRAWING CUSTOMERS: Every challenge to our business, whether it be recession, pandemic, or both, gives us the ability to grow and adapt to ever-changing circumstances. As we have seen in the Indian gaming market, guests are ready to come back, and they will if they feel safe and comfortable.

Going forward, the amenities tribal properties offer will need to consider new health regulations, and the perception of ‘clean’ that will linger long after COVID-19 has been defeated.

Guests to our tribal casinos still want the ‘escape and abundance’ offered by yesterday’s buffets, but now will have wait service. With minor modifications, guests can still see the food, direct the quantity, and remain safe. This new level of interaction provides another valuable loyalty-building opportunity.

The option of outdoor dining will be a trend that stays with us. While many restaurants are blocking off streets to increase dining capacity, we have the opportunity to provide beautifully landscaped courtyards with fireplaces that provide the guest with fresh air and a purpose-built environment.

Guestrooms are now being designed and serviced differently. In the past, most hotels would have only a handful of ‘pet friendly’ guestrooms, with hard surface floors. These rooms are being more frequently requested by guests now because of the perception that a hard surface floor is cleaner than carpeting.

Some entertainment amenities, like bowling, can easily be operated at greater than 50% capacity. Most regulations require a single unoccupied lane between groups. If a group or family takes two lanes only one is left vacant before the next group picks up. The ability to build upon the integrated resort concept encourages Indian gaming facilities to be even more of an entertainment hub than before.

Brian Thomas, Executive Vice President
Tutor Perini Building Corp.
tutorperinibuilding.com

NAVIGATION: As our country and the world continue to respond to the growing impact of COVID-19, Tutor Perini has taken important steps to protect our employees and clients in this extraordinary time. Our business plan that we exercised as a result of COVID-19 called for several actions, including restrictions on employee travel, activation of remote work policies, enhanced monitoring, and increased redundancy of our core systems.

The successful activation of these measures allowed us to shift the vast majority of our employees to remote work, and to maintain normal operations across our network, applications, and client delivery. Our communications systems, including Zoom and Microsoft Teams, and other collaboration tools, give us the ability to conduct virtual video conferencing where needed. We are using and relying on technology each day, to

Tutor Perini Building Corp



Brian Thomas

reach out to our clients to discuss our ongoing construction projects and also to interview for new projects as well.

Our number one priority has always been to provide a 'safe working environment' for our employees in our offices and also on our projects. During this time frame, we have implemented additional rigorous cleaning and hygiene protocols throughout our projects and are practicing other

safety precautions including social distancing, daily screening, and temperature checks to protect all of those around us each day.

We have all now experienced knowing someone who has tested positive or have been exposed to someone who potentially is positive with COVID-19. TPBC understands the importance of being flexible and understanding with our client's needs and also their customer needs as it relates to how COVID-19 is affecting their daily lives as well. Some individuals now have children at home; high risk family members at home; are staying at home quarantining from a potential exposure; or are sick with COVID like symptoms. Again, staying in constant communication with our clients and understanding their daily challenges as we battle through this pandemic will be the key to success.

DRAWING CUSTOMERS: There are various options, techniques, and protocols that are available, and many properties are now implementing new ideas moving forward. One option is having automatic door openers that are motion sensor activated. Door handles

are the most touched object in a casino besides slot machines. Almost every person that enters into a casino has come in contact with a door to get into the property. Removing that contact will reduce contamination dramatically. A lot of properties are now placing Plexiglas screens between slot machines and at gaming tables.

Reconfiguration of gaming floor space and strategic slot machine placement to accommodate social distancing is an option that we see being implemented in existing operations and also in new construction. In some instances, this would cause a reduction of machines being used, or an expansion to the gaming floor area. With regard to food service and restaurants, the level of service may be the key factor. Removal of self-service beverage areas and buffet dining will provide for cleaner and a safer environment, but could be a financial impact to a lot of properties. Having empty tables instead of presetting with silverware and plates may be the new safe option at restaurants.

One technique being looked at is ultraviolet light systems being installed in the ventilation ducts to help neutralize Coronavirus. This system focuses on filtering the indoor air, not just the outdoor air coming in. Other options are increased sanitation stations, upon entry a noninvasive temperature check with thermal scanners, no touch ID scanners and ultrasonic chip cleaners.

The big question is, 'how will the customer experience be impacted' with all the new safety measures put in place, and will those measures be permanent or temporary? ♣

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