

Office Relocation Planner



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Introduction

Regardless of the size of your company, moving offices is a huge undertaking. The key is to plan ahead and minimize the chaos with detailed checklists. In the back of the remaining chapters, you will find checklists that cover each area of your relocation. These make excellent guidelines for determining what comes next in any given process.

Ask the Tough Questions

Before going too far down the relocation road, it's essential for a business to have answered the following questions:

- Is a relocation required? Perhaps your space could be renovated, or reconfigured to be more efficient.
- Are there other alternatives? If your space has become too large, maybe you could sublease a portion to another business.
- Would telecommuting work for any of the employees that currently are using office space.
- If a move is definitely in your future, are there seasonal fluctuations or other considerations that will affect the timing. (If your operation is busiest during the fall and winter, you'll want to try and schedule your relocation during the spring or summer months).

It's important to be sure that a move, and when it occurs, is right for your company.

Planning and Coordinating the Move

When you're sure that relocating is the best option, a moving coordinator and/or moving team should be selected from your staff, immediately after the decision to move has been made. Your coordinator should be flexible and calm in a crisis; and also have enough authority around the office that employees will listen to his or her requests. This person will also be working with contractors, space planners, architects and all of your moving-related vendors.

Smaller companies usually just need a moving coordinator, but if your company is medium-sized or larger, and has several departments, you're most likely going to want to select a moving team, as well. The moving team should include a representative from each department in the company. Input from all areas and departments will insure that fewer details are overlooked during the relocation process.

Keep the following in mind when making your coordinator and/or team selections:

- Choose employees who are organized, competent, communicate well, and have the ability to make good decisions.
- Those who accept the additional responsibility of being on the moving team should understand that evening and weekend work may be necessary.
- Make sure members of the moving team are given the authority to make decisions on the department's behalf.
- Assign specific tasks to each individual and provide set timeframes for each task.
- Moving team members will have to be available for weekly progress meetings, as well as having the flexibility to complete their assigned moving tasks.

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Chapter 1

Facility Selection

Any business relocation process begins with a search for an appropriate facility. The facility search can range from a relatively simple process, commonly the case with very small organizations or start-up ventures, or can be a long complicated process. Following are the steps necessary to select and lease a new facility for your business.

Establish Your Criteria

In order to get the process off to a positive start, criteria for your new facility should be established well in advance of visiting buildings. Every aspect of these buildings and their locations, economic and non-economic, should be given thoughtful consideration. From this evaluation process, your organization can establish criteria to meet their facility needs, and a means by which to measure all of the possible sites for the relocation.

Some of the considerations that most businesses take into account while establishing a set of criteria are:

Economic Considerations

Cost of Occupancy

- Rental Costs
- Associated building costs, i.e. utilities, real estate taxes, maintenance

Costs for ancillary services

- parking
- telephone exchange issues
- transportation

Non-Economic Considerations

Geographic considerations

- Location of existing and future employee base
- Synergy from the area's existing business environment
- Proximity to customers
- Ease of access
- Area amenities

Building Image

- The new building should make a positive statement about your company.
- What conclusions do you want your customers to draw from their perceptions of your building?
- Will the facility image enhance or detract from your ability to hire quality employees?

Employment Base

- Will your company lose employees as a result of relocating too far from their residence?
- Which locations will provide a sufficient employment base?

Functionality

- What type of space layout will best suit the organization—open office with modular systems furniture or a more traditional environment with many private offices?
- Will your future needs require potential changes in the floor plan? If so, consider adding some flexibility to your space during the planning process.
- Does the new facility allow for growth?

Selecting a Commercial Real Estate Agent (Broker)

Many businesses hire consultants to handle various aspects of their relocation, the most common being the commercial real estate broker. In fact, real estate brokers are involved in the vast majority of commercial lease and purchase transactions. This is particularly the case in metropolitan areas, where a wide variety of properties are available.

Commercial brokers are used on a regular basis because they add convenience and expertise to the facility selection process, saving the lessee or buyer, time and money. Their expertise and market knowledge can be invaluable in helping businesses examine and evaluate the facility alternatives available.

If you choose to select a commercial real estate broker, they will do much of the work described through the balance of this section. However, it is still important for you to remain in touch with the process. In spite of your broker's market knowledge, you are the expert on your business' needs, therefore, you must remain active in the process to ensure your organization's requirements are being considered and met.

Identify Potential Properties

Based upon the facility criteria established at the beginning of the project, you are now ready to search for property which best meets these criteria. It is probable that no single property will meet all of your needs, therefore, you will most likely be searching for alternatives that meet as many of your criteria as possible. At this point, don't eliminate alternatives based solely on perceptions.

Identifying possible building alternatives can be as simple as taking a drive through the geographic areas that meet your criteria. While searching for properties, record the name and address of the building, as well as the telephone number usually found on the leasing sign. If there is not a leasing sign, you can usually find this information on the building directory, located in the lobby.

Property Tour

Once a list of possible property alternatives has been developed, schedule a time with the landlord or listing agent, to visit these properties in person. When touring the buildings, ask specific questions that will give insight to how the building meets your criteria. Information gathered from this tour will be used to eliminate many of the initial alternatives. It is suggested that as many buildings be visited on the same day as possible, allowing you to better compare the merits and nuances of each property while they are fresh in your mind.

Narrow the Alternatives

Based on the information gathered during the property tour, it is time to narrow the alternatives to the two or three properties that best suit your needs. This will be a manageable number of buildings from which to complete a more in-depth and detailed evaluation.

Space Planning

The next step in the process is to determine how the space requirements of your business fit into the building. In office and light industrial leasing, landlords will usually provide, at their cost, a space planner or architect to perform space planning within the building. The space planning process will give the tenant insight as to how well a building will fit their needs. Although two or more buildings may appear to have office suites which are suitable for your business, once the space planner incorporates your requirements into the suite, the differences in function and efficiency should become more evident.

Develop a Request for Proposal

Once you have narrowed your search to two or three buildings, and space planning has been performed, you should prepare a Request for Proposal (See Exhibit 2 on page 52) for each building you are considering. This will allow each landlord to address the specific issues that are relevant to your building selection.

Your Request for Proposal should include the following information:

- Building Location
- Area
- Lease Commencement Date
- Lease Term
- Rental Rate
- Building Operating Expenses
- Expansion Opportunities
- Option to Extend
- Mechanical Systems
- Property Management
- Fire/Life Safety Systems
- Security
- Parking
- Building Ownership
- Amenities

In order to make an “apples-to-apples” comparison of the remaining alternatives, make certain the information contained in the Request for Proposal, which you will send to each landlord or agent, is consistent. Set a time frame for the landlords who were solicited for a proposal to respond. Once you have received all proposals, prepare an analysis in spreadsheet form (any number of spreadsheet programs will suffice for this purpose) to compare how each of the alternatives stack-up. (See Exhibit 3 on page 55). Whenever a landlord’s response is unclear, make a few telephone calls, or send facsimiles, requesting further clarification of the specific item(s) contained in the respective landlord’s response.

Select the Property

Once all clarifications have been received, and the analysis is complete, the property, which will best suit the needs of your business, should be evident. If the decision is still unclear, schedule a time with the landlord or agent to visit each of the buildings again. This last visit may uncover further considerations in narrowing your choices for a facility.

Lease Review & Execution

After selecting the property that will best suit your business' needs, request that the landlord prepare a lease agreement. It is important for you to review the document carefully and to have an understanding of all of the terms and conditions of the lease agreement. Be sure that the lease includes all of the terms negotiated in the proposal. Because of the importance of this document, most businesses have their lease agreements reviewed by an attorney.

After the lease has been reviewed, and any changes to the document have been made, final copies should be prepared by the landlord for signature. Before signing, make certain all changes have been incorporated and that the lease agreement reflects the spirit of the tenant and landlord's agreement. After the lease has been signed by both landlord and tenant, enter all pertinent dates and information which are time sensitive into a calendar, i.e., lease expiration and the final date your business can execute expansion or renewal options. It is important to be aware of the pertinent dates and terms of your lease. Don't depend on your landlord to remind you when an option will expire.

Strategic Considerations

Facility Selection

- *Interview several commercial real estate brokers. Be sure to check references of the individual agent(s), as well as the companies they represent.*
- *If in doubt as to the amount of space you will require, plan for approximately 200 square feet per person. If your space is more than 50% private offices, you may need a little more space, if it is more than 50% open area, you could possibly use a little less. This rule of thumb is intended to give you a starting point for your square footage requirement. As you look at various locations, you should be able to further pinpoint the amount of space you will need.*
- *When touring buildings, plan to see as many as possible on the same day. If your tour will take more than one day, try to schedule your building tour on consecutive days.*
- *Keep a file of any information you receive from the landlord or agent, and take notes.*
- *The space planner responsible for your office layout should verify the measurements and requirements of both new and existing office furniture and workstations to insure a proper fit in the new office. Make the space planner aware of any oversized items you may have.*

- *Determine insurance needs.* Most landlords require personal property and general liability insurance of specific limits. The required coverage must be in effect, and you will need a “Certificate of Insurance” from your agent prior to your occupancy. Advise your insurance agent that the building owner must be named as an additional insured.

- *Examine the lease for sign restrictions and approvals.* Most landlords will require a drawing and specifications provided by the sign contractor, for sign approval.

- *If you have extensive file or storage needs, find out if there is any unusable space in the building that could be rented at a lower rate for storage, i.e. basement, etc.*

Action Steps

Facility Selection

	Timing Prior to Move (in months)
<input type="checkbox"/> Select a commercial real estate broker, if desired.	10 – 12
<input type="checkbox"/> Develop facility/site criteria.	10 – 12
<input type="checkbox"/> With your broker's help, if using, identify properties which best meet your requirements.	10 – 12
<input type="checkbox"/> Contact landlords/real estate agents to set up appointments for building tours. (If you're using a broker, he/she will do this for you.)	9 – 11
<input type="checkbox"/> Tour selected buildings, take detailed notes.	9 – 11
<input type="checkbox"/> Prepare spreadsheet analysis of buildings/offices (see pg. 55).	8 – 10
<input type="checkbox"/> Using spreadsheet analysis, narrow alternatives to 2 or 3 choices.	8 – 10
<input type="checkbox"/> Through landlord/real estate agent, begin space planning process.	8 – 10
<input type="checkbox"/> Based on your needs, develop a Request for Proposal (see pg. 52).	6 – 8
<input type="checkbox"/> Deliver the Request for Proposal to landlord(s)/agent(s).	6 – 8
<input type="checkbox"/> Update spreadsheet analysis (see pg. 55) with information collected from the proposals. Delete buildings you are no longer interested in.	6 – 8
<input type="checkbox"/> After analyzing and evaluating proposals, rank the properties in order of preference. Re-tour, if necessary.	4 – 6
<input type="checkbox"/> Request a lease from your 1 st choice, and possibly 2nd choice properties.	4 – 6
<input type="checkbox"/> Check lease for accuracy, send to attorney for review.	4 – 6
<input type="checkbox"/> Ensure any negotiated lease revisions have been incorporated into final document, sign lease.	3 – 5
<input type="checkbox"/> Finalize space plan and interior color selections, construction should begin on space as soon as lease has been signed and final plan has been approved.	2 – 4

*Timeframes listed refer to existing buildings. If your facility will be newly constructed, add 9 mos. to one year to each range listed. These timeframes are ideal, however, the process can be completed on a tighter schedule, if necessary.



Chapter 2

Moving Companies

Selecting a moving company is the most obvious and underrated aspect of the relocation process. Don't expect the same company who moved you into your new home to be equally qualified to perform a commercial move. Moving companies with little experience in office and industrial relocations may have difficulty delivering the service needed for a smooth transition into the new facility.

The more experienced the mover, the less time you will need to spend managing them during the actual move. Depending on the size of the relocation, many moving companies will have a supervisor on site coordinating their employees' efforts. This means you will be free to focus on other issues that come up on moving day.

Begin Early

Last minute surprises can sabotage even the best-laid plans, therefore, it is important to begin the moving process well in advance. If you are not aware of any commercial movers in your area, ask your new landlord for their recommendations. (You may also want to request the names of companies who have recently relocated into your new building, whom you can call for moving company referrals.)

Establish Scope of Work

As with selecting your facility, establish the scope of work that you expect the moving company to perform. This may be a preliminary scope at first, which you can define as you become more familiar with the services offered by most commercial movers. By defining the scope of work for the moving companies, you will be sure that none of the companies bidding for your job will omit important details. This will also allow for an “apples-to-apples” comparison of the bids you receive from the moving companies.

Contacting the references of your top few moving company selections will provide you with further insight into their performance. Make certain to check references that have recently been involved in the relocation process.

Strategic Considerations

Moving Companies

- *Contact moving companies as soon as you have determined the location of your new facility.* Scheduling the mover early is imperative, because most leases terminate at the end of the month, becoming a natural peak of activity for commercial movers.
- *Share consistent information with all potential moving companies in order to get comparable bids.*
- *Remember that bids are only estimates* and some moving companies may underestimate in order to win your business. Always confirm their accuracy by comparing each of the proposals for the amount of man-hours the mover estimates.
- *Check references that are current,* because many moving companies experience rapid turnover in employees. Ask if the movers were cooperative and careful, and how closely they kept to their estimate.
- *Make sure your moving company is equipped to handle your unique needs.* For example, there are industrial movers who specialize in moving inventory or heavy equipment usually found in warehouses or industrial facilities.
- *Determine whether the mover or your employees will be packing.* Most movers recommend that individuals pack their own desk and personal items.

- *Find out if the mover will supply boxes and packing materials prior to your move date.*
- *Establish a person or location to keep track of all “master keys” to file cabinets and/or desks, if applicable.*
- *Make arrangements to relocate office plants.* Small plants should be transferred personally; however, special arrangements will have to be made for larger plants. If the plants are leased, contact the leasing company. In general, movers are not responsible for the safe transportation of office plants.
- *Determine how the mover intends to move computer equipment.* Ideally, the mover will utilize carts designed to minimize jarring. Protective covering should be dust-free to avoid internal damage to computer equipment.
- *Enlist your mover’s expertise to offer solutions and to identify ways of saving money on your move.*
- *Ask for detailed information on insurance coverage and the claims procedure.* Check with your own insurance agent to determine coverage during the move. Ensure that you have adequate liability coverage for employees and materials, before, during and after the move.
- *Determine whether there is any equipment that the mover will be unable to move (computers, copiers, etc.) and make other arrangements if necessary. (See the “Information Technology” and “Office Equipment” sections.)*
- *Supply your mover with a floorplan/space plan from which to work. Identify areas and offices by name or number, and label boxes and equipment accordingly.*

- *Ask your building's (current and new location) property manager or landlord if there are any restrictions placed on the time of day, or day of week you move. Many landlords require moves to take place after normal business hours or on weekends. They may also require certain entrances and/or elevators be used for the move.*
- *If you will be utilizing a freight elevator in the building, find out if you'll need a key. If so, make arrangements to get the key prior to the move.*
- *If moving after hours or on a weekend, check to see that the building will be open (if you don't already have a master key) and whether or not the heating and cooling system will be in operation. Also, check to see if there are any requirements for additional building security during after-hours moves.*
- *Permits may be required if streets will be blocked during the move. Contact the local police if your mover thinks this will be an issue.*
- *If possible, don't use a mover who employs temporary help. Insist that all moving company personnel are experienced employees of the mover.*
- *Protective floor covering and wall protection should be provided where needed, in both old and new locations.*
- *Schedule a walk-through with your moving vendor to assess any damage to furniture and equipment before and after the move.*
- *Determine in advance which employees will be on hand during the physical move.*
- *Make arrangements to have pizza, sandwiches, or a catered lunch brought in on moving day. This will serve two purposes: it will show your appreciation for the employee's efforts and it will maximize the efficiency of the move by keeping the employees on-site.*

Action Steps

Moving Companies

	Timing Prior to Move (in days)
<input type="checkbox"/> Inventory furniture and equipment. Identify which items will not be moved.	180
<input type="checkbox"/> Schedule three movers to perform a site visit of existing offices and to prepare proposals.	150
<input type="checkbox"/> Review proposals, check references.	120
<input type="checkbox"/> Select mover. Set move date, if possible.	90
<input type="checkbox"/> Check with new and existing building managers for moving restrictions. (Time of day restrictions, specific exits/elevators, etc.)	75
<input type="checkbox"/> Prepare moving schedule based on building management specifications. Distribute to new and existing building managers. Update mover of any schedule changes.	60
<input type="checkbox"/> Arrange to have packing materials delivered.	45
<input type="checkbox"/> Prepare a moving agenda and deliver to all employees.	30
<input type="checkbox"/> Employees may begin packing non-essential items (files, etc.) Depending on the quantity, you may want to start this sooner.	30
<input type="checkbox"/> Schedule a walk-through with your mover to identify any existing damage to furniture and walls.	15
<input type="checkbox"/> Select staff members to be on hand to answer mover's questions and supervise move at new and existing locations. Preferably, individuals from the moving committee.	15
<input type="checkbox"/> Create a "master map" of new floorplan. Name or number each office and area. Denote names of staff "supervisors" for each area.	7
<input type="checkbox"/> Distribute packing materials and copy of "master map" to each employee. Have each employee label their own furnishings, etc., per the "master map."	5
<input type="checkbox"/> Per "master map," label any remaining furniture, equipment and boxes with corresponding names or numbers.	3

- Remind staff to have everything packed before end of day. 1
- Moving day! 0
- Check all furniture and equipment for any damage caused during the move. -1
- Contact moving company for damage/insurance claim forms, if necessary. -1
- Determine if the moving company needs to return to rearrange any furniture or equipment that may not have been placed correctly. -7

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Chapter 3

Information Technology

Relocating Your Information Systems

A smooth transition of your computer systems and network, between facilities, will ensure continuity and prevent any data loss, as well as minimize your company's downtime.

Many companies will use their relocation as an opportunity to upgrade or replace their systems with new technology. In these cases, the existing equipment can be operated up to the time the new system has been installed, debugged, and is fully operational.

The greater challenge occurs when a company is planning to relocate their system from the existing facility to the new facility. Under this scenario, your company will need to identify when to make the transition from one facility to the next. It is ideal for this to occur during a weekend or overnight.

Qualify Your Mover

Depending on the sophistication of your network, your computer vendor/consultant may be comfortable with your mover relocating the equipment. In these cases, verify your mover has experience in moving computer equipment, and the devices (such as computer carts) for the relocation of this equipment.

Usually, computers and peripherals should be relocated by the computer vendor/consultant who will be restoring and debugging the system upon completion of the move.

Enlist Your Expert

Many companies have a person in-house, or a computer systems consultant, who is responsible for maintaining the computer and network systems on a regular basis. This person(s) will be an integral part of the relocation and should be on-site or on call during the actual move. To prevent costly mistakes, bring this person(s) into the process early and keep them involved every step of the way.

Backup Your Data

The single most important aspect of relocating a computer/network system is to stabilize the system and backup all data prior to system shutdown. In order to be thorough, it is a good idea to stop, or minimize system input or changes for a short period of time before backing up.

If your company uses its computer system for order taking and cannot afford to shut the system down during business hours, plan to take orders manually, and input them later when the system is back in operation at the new facility. Before moving day, hold a brief training session with employees regarding the order taking process.

Lastly, consider developing a disaster plan, in the event of a “worst case scenario”. Although it is unlikely the plan will ever be used, if it is needed, your disaster plan could mean the difference between a minimal loss of productivity and disaster.

Strategic Considerations

Information Technology

- *Utilize your computer/network consultant from the beginning.* Whether this person is in-house or a hired consultant, they can help prevent a company from making costly errors, which occur when information technology issues are overlooked.
- *Discuss the relocation of your computer system(s) with your computer vendor.* If they are comfortable with your moving company relocating the equipment, make certain your mover has the experience and necessary equipment for such a move.
- *Consider relocation of your company's data processing system at the time when it is utilized least, i.e. overnight or on a weekend.* This will give you ample time to restore and debug the system before it is placed back in service.
- *Prior to the actual move, set aside enough time to stabilize and backup the company data.* Have all employees utilizing PC's back up their own equipment.
- *Keep track of all equipment cables, power cords and phone wiring.* Label cords accordingly and keep them with their specific piece of equipment. Something as simple as placing peripheral computer equipment (such as cables, the keyboard and mouse), in a bag and attaching it to the computer with packing tape, will eliminate headaches later when reinstalling the system. Loss of peripheral equipment will mean a loss of productivity.

- *Consider using a manual system of order taking if the computer must be relocated during hours that customer's orders are anticipated. These orders can then be entered into the system when it is restored at the new facility.*
- *Make arrangements to have a dedicated power source installed at your new location for your network server.*
- *Consider maintaining a bank of network connections for key employees to utilize on moving day.*
- *Develop a disaster plan.*

Action Steps

Information Technology

	Timing Prior to Move (in days)
<input type="checkbox"/> Determine whether any equipment needs to be upgraded or replaced.	120
<input type="checkbox"/> If new equipment is required, make arrangements to interview vendors and begin the selection process.	120
<input type="checkbox"/> Contact your computer vendor/network consultant to determine the process of relocating your computer equipment.	90
<input type="checkbox"/> Check with moving company to see if they will be responsible for relocating computer equipment.	90
<input type="checkbox"/> With the assistance of your network consultant, establish the requirements of your network and data cabling for the new facility.	75
<input type="checkbox"/> Notify the landlord/agent at your new location of your network requirements. Locations of data lines need to be noted on your space plan. (See Telecommunications section for detailed information on voice and data cabling.)	60
<input type="checkbox"/> Schedule your network consultant to shut down your network immediately prior to your actual move, and restore the network at the new location as soon as feasible.	30
<input type="checkbox"/> Back up all company data. Require employees using PC's to backup their own equipment.	1
<input type="checkbox"/> Have network consultant on hand near the end of the business day for the shutting down of the network. Make sure all employees know when this is scheduled to occur.	1
<input type="checkbox"/> Network consultant should restore network as soon as computer equipment arrives at the new location.	0



Chapter 4

Telecommunications

For most businesses, seamless transfer of telecommunications is the most critical aspect of their move. Smooth transition of telephone and network connections during the move will minimize productivity loss.

Location Cost Impact

It is important to be aware that the location you select for your new office can affect your communications costs, both in installation fees and monthly charges. Your new location could also affect the area you can call without toll charges. The size of your metropolitan area and which numbers are frequently dialed, could have a tremendous impact on your phone bill.

Notification of Number Change

If your phone number will change, be sure to get an “operator intercept” that will notify callers of your new number, or forward the calls directly. This is normally offered at no charge for a set period of time, which will vary depending on your local service provider. You may be able to extend this period by paying a fee.

Plan Your System & Facility Carefully

When planning your telecommunications strategy, keep in mind you may need a phone/network room that is clean, dry and “environmentally friendly” to high-tech equipment. This room needs to be within your suite, and should have dedicated power for your phone system and your computer network server (See the “Information Technology” section).

Some landlords utilize what is commonly known as a “shared telecommunications service”. This is a pooling of the usage requirements of tenants of the building or development in order to get “volume discounts”, some of which are then passed on to the tenants. If this type of service is available, it is usually less expensive for a small business.

Your cabling strategy should consider network connections, telephones and fax machines. Most devices can use the lesser expensive Category 3 cable, however, the network connections should be Category 5 or Category 6 in the cable, jacks and patch panels. Your building landlord may require the use of plenum rated cable to comply with fire code regulations. Make sure you have planned adequately for your current and future cabling requirements. It is less expensive to have an adequate amount of cable, and voice and data outlets installed before you move, than to make changes afterward.

Frequently businesses will use a relocation as an opportunity to improve the technology of their telecommunications system. If you will be purchasing a new phone system, you should give yourself enough time to select from vendors and place an order at least 60 days before your move. If your telecommunication needs exceed 100 telephones, you will need to add lead-time to this estimate (consult with the vendors regarding their required lead-time for system delivery). If possible, build in at least five years of growth capability into the new phone system.

Strategic Considerations

Telecommunications


- *The location of the new facility may affect your ability to maintain your current phone numbers. If keeping your current phone numbers is important, check with your local service provider to determine your geographic limitations.*
- *If your new building has an open plenum, you will be required to use plenum rated cables.*
- *Consider your network connections and voice/telephone system requirements.*
- *Allow for 5 years growth in the company phone system.*
- *Add as many outlets (voice and data) as you will need to accommodate future growth.*
- *Does the building landlord utilize any shared tenant services providing discount local and long distance service? Check with your landlord regarding telecommunication services offered in your new facility.*
- *Contact your local phone directory publisher to determine their listing and advertising deadlines. If you anticipate your move to take place after their deadline, you might consider finalizing your lease and having your phone lines installed earlier in order for your new numbers to be included in the upcoming white and yellow pages.*

- *If not provided by the manufacturer, have your telephone system vendor prepare a “cheat sheet,” summarizing the basic operation of the telephones. Provide one with each phone at the new location.*

Action Steps

Telecommunications

	Timing Prior to Move (in days)
<input type="checkbox"/> Identify current telecommunications usage and future needs.	120
<input type="checkbox"/> Consider whether to relocate your existing telephone system or purchase new.	120
<input type="checkbox"/> If the decision is made to purchase a new phone system, set up meetings with three phone system vendors; have each vendor submit a written proposal.	105
<input type="checkbox"/> Select three long distance providers to submit quotes for their services. (Remember to check with landlord on the availability of shared telecommunications services.)	90
<input type="checkbox"/> Review phone system and long distance proposals, select vendors.	90
<input type="checkbox"/> Select three voice and data cabling companies to review the space plan and tour the new facility to determine your cabling needs. Have each company submit a proposal for the services you'll require.	75
<input type="checkbox"/> Choose voice and data cabling vendor. Schedule installation to occur within 30 days of your move in date. Coordinate with landlord and/or building contractor.	60
<input type="checkbox"/> Make arrangements for phones to be operational on moving day. If necessary, have phones forwarded to temporary or home offices during actual move.	45
<input type="checkbox"/> Cabling vendor should begin installation at new facility.	30
Hold training session for employees to learn new phone system.	7
<input type="checkbox"/> Have phone system representative on hand to answer questions and assist with any issues that may arise.	-1



Chapter 5

Office Equipment

Leased Equipment

Because of liability issues, movers should never relocate leased equipment, unless you have the prior approval of the equipment vendor. Typically, equipment that is leased must be handled and moved by the equipment's vendor.

Equipment Preparation

Copiers require service prior to and following a move. In spite of their frequent use and everyday wear and tear, copiers are relatively sensitive pieces of equipment and should be handled with the utmost care. As mentioned earlier, if your copier is leased, the copier vendor should relocate the equipment for you, as well as, perform the before and after servicing. If you own your copier, contact your service vendor and ask for their recommendation on moving your copier.

Other equipment, including fax machines, postage meters, typewriters, etc., should be repackaged in their original cartons, if possible. If you have not retained the original packaging materials, ask your mover to provide the appropriate boxes and packing material to secure these items during the move.

Strategic Considerations

Office Equipment

- *Determine whether there is any equipment (such as copiers) that the mover will not relocate. Check with your moving company for specific guidelines on what they will and will not move.*
- *As a general rule, equipment that is leased must be handled and moved by the equipment's vendor. Contact your equipment leasing company for their moving guidelines and requirements.*
- *Make arrangements to have a dedicated power source installed at your new location for your copier and any other equipment requiring dedicated electrical power. Frequently, laser printers will also require dedicated power.*
- *Check with your insurance company prior to moving, to make certain all equipment is adequately covered under your existing policy during relocation.*
- *Keep track of all equipment cables, power cords and phone wiring. Label cords accordingly and keep them with their specific piece of equipment.*
- *Keep all equipment manuals and service logs in a centralized location during the move to keep them from being misplaced.*

Action Steps

Office Equipment

	Timing Prior to Move (in days)
<input type="checkbox"/> Determine whether any equipment needs to be upgraded or replaced.	120
<input type="checkbox"/> If new equipment is required, make arrangements to interview vendors and begin the selection process.	120
<input type="checkbox"/> Review equipment vendor proposals, select vendors.	90
<input type="checkbox"/> Once equipment needs are determined, place orders, set delivery for the day before your actual move-in date.	90
<input type="checkbox"/> If existing copier(s) and/or fax machine(s) will be moved, contact vendors to schedule removal of toner and determine whether they would prefer to move the equipment. (If your copiers and/or fax machines are leased, you'll probably be required to have them moved by the company they were leased from.)	60
<input type="checkbox"/> If copier/fax vendor will be relocating equipment, schedule the moving date.	60
<input type="checkbox"/> If you have bottled water, coffee service and/or vending machines, schedule respective vendors to relocate their equipment.	45
<input type="checkbox"/> Take delivery of copier at new location, verify that the toner has been replaced and that the equipment is operational. Make sure you have two extra toner cartridges on hand, if not, place an order for additional toner.	0
<input type="checkbox"/> Verify that coffee service equipment, water cooler and vending machines have been delivered and are operational. Ensure there are adequate levels of supplies for these types of equipment, i.e., coffee, water bottles, disposable cups, etc.	0



Chapter 6

Systems Furniture

Although the relocation of office furniture is covered in the section of this planner dedicated to working with a mover, systems furniture requires special consideration. Systems furniture is sold in a wide variety of brands, sizes, and colors for almost every type of use. If you use these systems, and have not already, you should begin to standardize your future purchases. This will provide the most flexibility, which is probably one of the reasons you originally decided to purchase the systems.

Evaluate Your Needs

Just as you analyzed your requirements for new office space, you should analyze the type of furniture system that best meets your needs. By identifying which systems best suit your organizational or departmental needs, you can focus your future furniture purchases on one, or just a few models of a particular system, in order to ensure flexibility of interchanging parts, interconnectibility, and layout, while maintaining a consistent, organized look to your office.

Wired or Non-Wired

One of the most significant decisions you will make when purchasing systems furniture will be whether to buy electrified or non-electrified panels. Electrified panels have electrical wiring run in the framing of the panels, allowing for an adequate supply of electrical outlets. Your voice / data cabling vendor will then run their wiring through the system, once again allowing greater flexibility for outlet locations. If

you are not using electrified panels, you will need to make certain the new landlord will provide enough electrical outlets to meet your needs. Obviously, electrified furniture systems provide you with more flexibility. The only detriment to using these systems is the cost, which is generally 15 - 20% higher than non-electrified systems.

Replacement Parts

When preparing to relocate your office, it is an excellent time to inventory any missing or damaged components of the existing systems furniture and investigate the feasibility of replacing parts. Some furniture manufacturers inventory pieces that can be ordered through their dealers. In addition, or as an alternative to purchasing new systems furniture, you may consider having your existing systems refurbished or upgraded. Contact your systems furniture dealer for information and recommendations on refurbishment, or upgrading.

Installation

Relocation of systems furniture is more complicated than typical office furniture. The obvious consideration is that the systems furniture will have to be disassembled prior to relocation, and then reassembled at the new office. As mentioned earlier, the mover is usually responsible for relocation of the furniture panels once they are disassembled.

Contact your furniture vendor for names of contractors who will perform the disassembly and reassembly work. Sometimes, furniture vendors have their own installation crews, or have a relationship with a vendor who can perform this work. However, make certain in advance that the vendor you choose is competent and is familiar with your brand of system furniture, and is comfortable with reassembling the systems you require for the new offices.

Strategic Considerations

Systems Furniture

- *Develop an in-house standard for your systems furniture. Consider the size(s), color scheme, brand and whether or not they need to be “wired”. This will allow you to interchange components and rearrange layout to ensure ultimate flexibility.*
- *If ordering new systems, ask for acknowledgments of all orders and shipping confirmations from the manufacturer(s). It is imperative that the furniture vendor confirms that the systems will be delivered to your new facility prior to your move, with enough time for assembly.*
- *If you currently use workstations, allow additional time for disassembly and reassembly by the systems furniture vendor.*
- *If your stations are “wired”, you will also need additional coordination of telephone and LAN cabling. Wired systems also require adequate electrical service and configuration (commonly known as a “pigtail” outlet) for connection to the workstations. Make sure your landlord has provided for this in the space plan.*
- *Determine if desktop or workstation lighting will be needed, in addition to the overhead lights provided in the building.*

Action Steps

Systems Furniture

	Timing Prior to Move (in days)
<input type="checkbox"/> Determine whether any furnishings need to be replaced, upgraded or purchased.	180
<input type="checkbox"/> If new furniture is required, select vendors to interview, evaluate product lines, review budgetary requirements.	180
<input type="checkbox"/> After site selection is complete, have each furniture vendor provide an office furniture layout and proposal.	150
<input type="checkbox"/> Review proposals, check references and select a furniture vendor.	120
<input type="checkbox"/> Based on your vendor's layout and proposal, determine your actual furnishing needs and place order with vendor. (This step should be done earlier rather than later.)	120
<input type="checkbox"/> If moving any existing workstations, schedule your furniture vendor to disassemble and reassemble them at the new location.	60
<input type="checkbox"/> Schedule delivery and assembly of new furniture after construction is completed, but prior to moving day.	30
<input type="checkbox"/> Verify that all systems furniture is assembled and configured per the proposal.	0
<input type="checkbox"/> Keep a list of all missing parts. Submit to your vendor for replacement within a week or two after your move. (It's best to wait until you've compiled a list of all missing parts, rather than submitting requests as they arise.)	-7



Chapter 7

Miscellaneous Issues

Be Prepared

During the relocation process, there are many tasks which don't seem to fit into any of the previously mentioned sections. These are often the small tasks that most people put off until the last minute. Miscellaneous items can range from having enough keys to the building, to writing and distributing a moving announcement to your employees.

Keep a Log

Because each business is unique, you may find that some issues arise which are not covered in this planner. As you become aware of such items, keep a log, listing the task and the approximate time frame for completion. If this is something that can be delegated, make a note of who will be performing this task. This will help to prevent additional items from falling through the cracks.

Save Your Records

It is very important to save all of your notes and records from your relocation. Because of the high likelihood that your company will move again in the future, the information you gathered during this relocation can be tremendously helpful in the next move. Also, careful record keeping can aid in the event a dispute arises with any of your moving vendors.

Strategic Considerations

Miscellaneous

- *Be sure that you have adequate liability coverage for employees, equipment, and furniture, etc. before, during and after the move.*
- *Assess any need for additional security at the new facility, beyond what the landlord normally provides.*
- *Confirm that any large or oversized furnishings will fit in the new space. Take measurements of furniture and doorways, etc.*
- *Verify how many keys and/or access cards will be required and order from the property manager or landlord. (Most landlords do not allow tenant's to duplicate keys.) The landlord may also request a list of employees who have keys and/or after-hours access.*
- *Check with your municipality to see if your company is due a property tax refund, when moving prior to year-end.*
- *To generate enthusiasm, post a photo or elevation of the building and space plan with paint, wallcovering and carpet swatches. If the new facility is local, take the employees on a tour. Insure that everyone feels included, and part of the "team".*
- *Determine if a telephone blitz is required, after change of address cards have been mailed, to notify customers and vendors of new address and phone numbers.*

- *Double-check with your vendors to make sure your account representative is also aware of your relocation. Your change of address cards often go to your vendor's accounting department, therefore, individual account representatives and delivery personnel may be unaware you have moved.*
- *When you are ready to notify the staff of the relocation, send a memo to all employees (see Exhibit 4 on page 57).*
- *Schedule each specific utility to be turned over to your organization at least one week prior to the move, if you, rather than the landlord, are responsible for utilities at the new facility.*
- *If you have a coffee service, or bottled water delivery,, let these vendors know about your relocation and schedule them to move their own equipment.*
- *After the movers have finished, provide a welcome package to employees. The package could include a company telephone directory reflecting new extensions, a map of the area and local amenities (check with leasing agent to see if they have a map that can be copied), and a welcoming gift or memento of the move (maybe an "I Survived The Move" paperweight or tee-shirt).*
- *When you are settled in the new space, plan a walk-through and punch list follow-up in these areas:*
 - Construction
 - Movers
 - Telecommunications
 - Computers/LAN
 - Systems Furniture

This will ensure that all systems are running smoothly and that any damage and/or negligence is determined and rectified.

Action Steps

Miscellaneous

- | | | |
|--------------------------|--|-----|
| <input type="checkbox"/> | Determine whether building provided security will be adequate for your needs. If not, arrange for security vendors to tour your facility and submit proposals. | 180 |
| <input type="checkbox"/> | Obtain address, phone and fax numbers for new location as soon as they are available. | 90 |
| <input type="checkbox"/> | Contact your insurance agent to make appropriate changes to your coverage, including notification of new address. | 90 |
| <input type="checkbox"/> | Arrange for printing or copying of change of address cards, include effective date, new phone and fax numbers, and website address, if applicable. | 45 |
| <input type="checkbox"/> | Order new stationery, envelopes, labels, invoices, checks, bank deposit slips, brochures, sales materials, business cards, etc. | 30 |
| <input type="checkbox"/> | Send change of address cards to banks, insurance carriers, credit card companies, newspapers, magazines, associations, clubs, vendors and customers. | 30 |
| <input type="checkbox"/> | Notify utility and service companies of disconnection and connection dates. Disconnection should occur just after mover's loading date, and new connection should occur just before mover's delivery date. | 30 |
| <input type="checkbox"/> | Notify landlord's representative of how you would like your company's name and/or logo to appear on the building monument, lobby directory and door sign, if applicable. | 30 |
| <input type="checkbox"/> | If desired, print labels with your new address, phone and fax numbers and any other pertinent information, to cover the old information on pre-printed brochures, etc. | 15 |

IMPORTANT BUILDING INFORMATION

New Location

Building Name:

Address: Suite #:

City, State: ZIP Code:

Leasing Agent:

Agent's Phone Number:

Management Company or Landlord:

Building Manager Contact:

Building Manager's Phone Number:

Building Maintenance Contact:

Emergency/After-Hours Number:

Other Important Information/Contacts:

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Current Location

Management Company or Landlord:

Building Manager Contact:

Building Manager's Phone Number:

Other Important Information/Contacts:

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Request for Proposal
DALY FINANCIAL, INC.

- Location:*** USA Building
100 USA Parkway, Suite 888, Dallas, TX 54321
- Area:*** Define the area, in square feet, of Suite 888.
- Lease Commencement Date:*** January 1, 2007
- Lease Term:*** Five (5) Years
- Rental Rate:*** Propose the most aggressive rental rate possible, in order for Daly Financial to make a decision on your facility. The rental rate should include all expenses that are the responsibility of Daly Financial during the term of the lease.
- Operating Expenses:*** Define the operating expenses of the building included in the above proposed rental rate. Include any expenses Daly Financial is responsible for in addition to the proposed rental rate.
- Expansion:*** Address whether there will there be any additional space available for expansion during the term of the lease.
- Option to Extend:*** Daly Financial requests one (1) option to extend the lease upon expiration, under the same terms and conditions of the original lease, with the exception of rent, which will be at the market rate for space in the building, which shall be agreed upon by both tenant and landlord. Daly Financial will give landlord 120 days written notice of the tenant's intent to renew this lease.
- Signage:*** What are the types and locations of signage provided. Please give detailed specifications and/or restrictions.
- Mechanical Systems:*** Describe the USA Building's mechanical system (HVAC). Include in your description: square feet per zone, hours of no-charge service, and cost for overtime usage.

- Property Management:*** Who is responsible for maintaining the building and are they are located on site. If not, please give location or property manager.
- Fire / Life Safety Systems:*** Describe the building fire protection and life safety systems.
- Security:*** What type of security is provided by the landlord.
- Parking:*** What is the parking ratio for the USA Building, and how it will accommodate Daly Financial's need for forty-two parking spaces (37 employee spaces and 5 visitor spaces).
- Ownership:*** Give an overview of the building ownership.
- Amenities:*** List amenities available to tenants of the USA Building. Additionally, include any information about the USA Building, which will be helpful in Daly Financial's decision making process.

Property Analysis

Location	Area/ Square Feet	Lease Term	Rental Rate/ Sq. Ft.*	Additional Expenses	Estimate of Additional Expenses**	Rental Rate w/ Expenses	Annual Cost of Occupancy	Growth Potential	Comments
800 W. State St.	5,742 s.f.	5 years	\$15.50	Housekeeping	\$1.25/s.f.	\$16.75/s.f.	\$96,179	+2,500 s.f.	Parking is tight. Good amenities.
715 S. Capital Blvd.	6,029 s.f.	3 years	\$17.85	None (All expenses are included)	\$0.00	\$17.85/s.f.	\$107,618	+4,000 s.f.	Good parking, but difficult access.
2037 Technology Dr.	6,197 s.f.	5 years	\$19.25	None (All expenses are included)	\$0.00	\$19.25/s.f.	\$119,292	None	On-site cafeteria, good parking and access.
300 E. 41st St.	6,422 s.f.	5 years	\$14.95	Utilities Housekeeping	\$1.50/s.f. \$1.25/s.f.	\$17.70/s.f.	\$113,669	None	Older building, no free parking, additional warehouse space available at reduced cost.

*Square foot rental rates are quoted on an annual basis. Some areas may quote rates on a monthly basis.

**Ask your real estate broker to estimate these expenses for your area. Utility and housekeeping expenses can vary greatly from one locality to another.

Employee Notification Memo - Sample

MEMORANDUM

Date: mm/dd/yy
To: All Office Employees
From: John Smith
Subject: Office Relocation

I am pleased to announce the relocation of our company. As a result of (company name)'s growth and change in space requirements, we have decided on relocating our offices to (new location).

In making this decision, many aspects of our business have been considered, most importantly of which is our employees. Although some of you may have a longer commute, I believe this move will benefit all of us through the continued growth and success of (company name).

I am looking forward to working with all of you in making our move a "team effort."

