

office fit-out checklist

A guide to your office fit-out and relocation

officeprinciples

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Refurbishing and fitting out a new office can be extremely beneficial but, if not planned and executed properly, it can prove to be disruptive and costly. It makes sense therefore to select the best company to guide you through the planning and implementation phases of your relocation and fit-out. The risks of getting it wrong can work out catastrophically for your organisation...

...so how can you avoid the traps and pitfalls?

Firstly, you need to spend some time reviewing and contemplating the guidance provided in this checklist and,

secondly, you need to find a design and build fit-out specialist in whom you can have confidence and trust.

Create A Vision

Relocating your business to a new building or extending the lease on your present building is a decision which will affect your business for years to come. Before making any premises decisions, you therefore need to have a strategic plan as to where your business is going. Start by confirming exactly why you need a new workplace and what you would like to get out of it.

- What are your growth plans? What turnover is forecasted for 5 years, for 10 years etc.?
- What does this imply in terms of staff numbers?
- Will the building provide for the needs of the staff, and will it attract the quality of personnel your organisation needs when recruiting?
- How important will the image of your building be? How often will clients visit your premises?

Consider why you are looking to carry out an office fit-out:

- Lease event (lease expiry / break option)
- Expansion / contraction / merger / acquisition
- Change of business location
- Business requirement to reduce overheads
- Desire to be nearer to your customers
- Change in working practices / increase in productivity

When deciding on the ideal location you should consider the following:

- Where your present and target customer-base is centred
- Where your key staff live
- Accessibility by road / rail / air
- The location of your suppliers



Do You Need To Do Any Research Before You Decide To Carryout A Fitout?

More and more companies are beginning to realise that, in order to be more successful, the role that the workplace plays for them has got to change. Most companies are unaware of the huge cost savings and other benefits of workplace optimisation and are missing out. Generally, it will be the need to fit-out an office that acts as the catalyst to consider workplace optimisation.

Leadership Workshop

The first place to start is through a leadership workshop or briefing session. This should be attended by the key project champions and senior stakeholders, who are in a position to make decisions within the organisation.

What are the objectives?

Create a list of objectives that you would like to meet through implementing an agile workplace. It is important to capture the aspirations of a business through an outline brief. The drivers of the project should be identified, which could range from creating a more efficient workplace and rationalising space usage, to enabling a higher level of occupancy. Objectives, projections and goals are all key building blocks that will help the team deliver an optimised workplace design within the desired timescale and budget. Some of the objectives that you might consider:

- Does your workplace support business growth?
- Does the workplace create brand differentiation?
- Does the workplace drive talent retention and attraction?
- Does your workplace support your sustainability credentials?
- Is the workplace cost efficient?

The Space Occupancy Study

Undertake a space occupancy study (SOS). This is a gathering of physical raw data based upon the current workplace performance and will enable analysis of the levels of utilisation as well as how meeting rooms, cellular offices, break out and general support areas as well as the room booking systems are performing. This data is obtained typically over a 2 week period and during a time outside the peak holiday season and which does not include any specific event such as a public holiday which will likely impact upon the office occupancy.

The Staff Interviewing Process

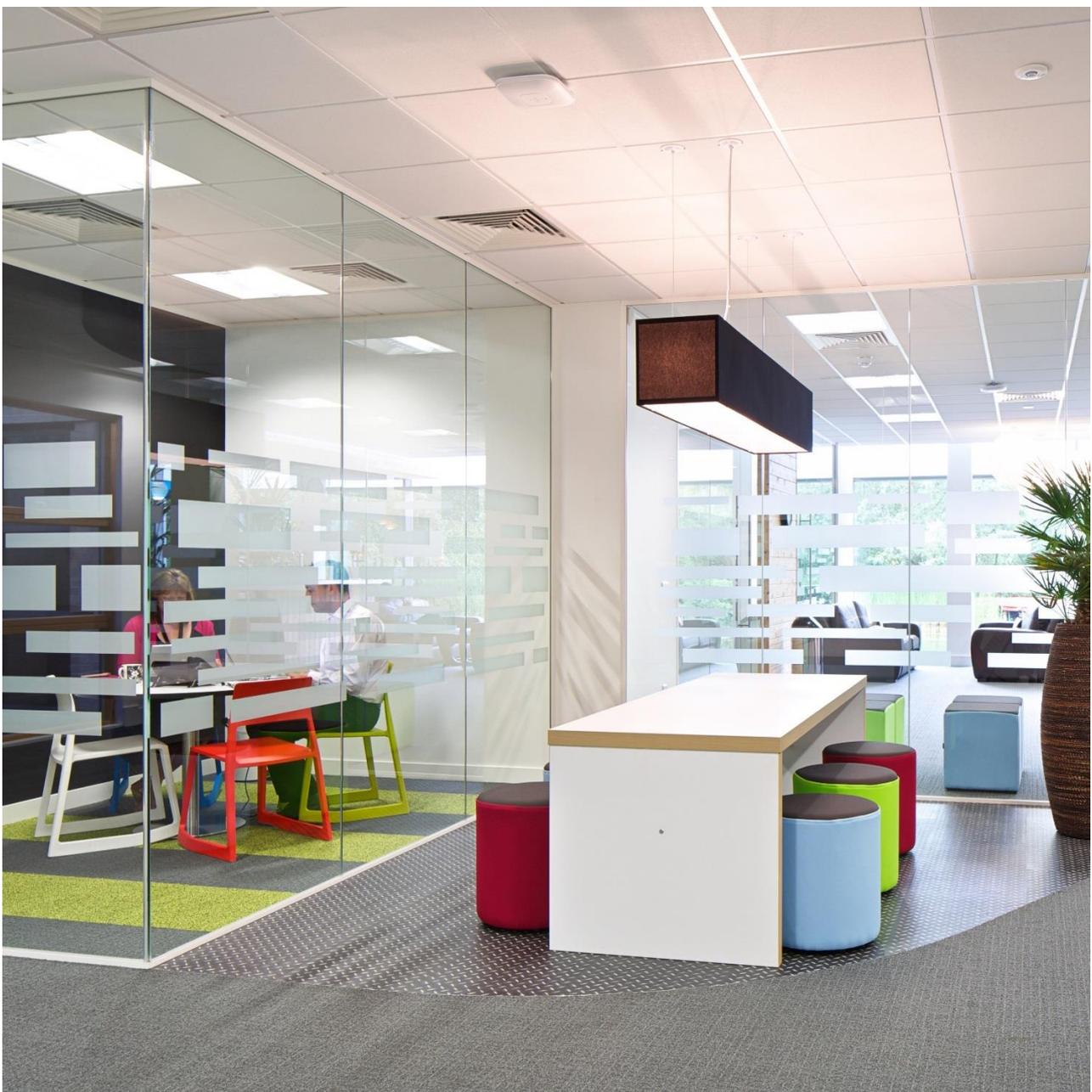
Once the SOS has been conducted the staff interviewing process can be started. This process enables a dip check of all the data to be obtained and ensures that it is valid. Teams will be monitored to understand key differences in the survey data and SOS as well as gaining a more thorough understanding of how teams function within the larger organisation.

□ **Staff Survey**

The interviews will be followed up with a staff survey. This can take the form of a paper based questionnaire given to all staff, or preferably an email link to an electronic survey form. The data obtained is strictly anonymous to ensure that a true understanding of staff and their concerns is obtained.

□ **Storage Audit**

Undertake a storage audit which is probably best done by your D & B specialist who will carry out an on-site assessment. The amount of filing is expressed in linear metres and will distinguish between the various size and types of filing you require. The results of the audit are then used to qualify and quantify the most appropriate solutions, which will focus on achieving the maximum storage from the minimum floor area, thereby achieving financial savings.





Budget

The budget for an office fit-out, relocation and refurbishment ranks amongst the largest chunks of business expenditure with which you are likely to be involved. Budgeting demands a rigorous and exacting approach, stretching across your entire corporate structure. When setting your budget you should consider the following elements:

Occupancy Cost

- Rent
- Business Rates
- Service charges
- Building insurance
- Building Surveys including Fire and Environmental Assessments
- Landlord's approval for alterations
- Schedule of Conditions

Capital Expenditure

- Office fit out and refurbishment
- IT Equipment
- Business phone system
- New office furniture
- Stamp duty land tax
- Rental deposit
- Dilapidations

Advisory fees

- Commercial Property agent fees
- Legal fees

Migration fees

- Removal and move management
- Storage and archiving
- Marketing – printing of new stationery and website changes
- Clean up and exit 'old' office

Soft costs

- Recruitment / redundancy costs
- Training costs
- Employee relocation
- Travel expenses
- Lost business
- Staff communication
- Contingency

Top Tip

It is key to ensure everything is factored into your budget – floor coverings, partitions, furniture, lighting, ceilings, reception, restaurant facilities, even car parking and travel plans. Check, check and check again with your fit-out specialist – you can never do enough checking. For instance, there may be elements to do with a building control application that you have not considered. Include a budget element to cover communication with your organisation's staff about the fresh, new appearance of their working environment. It is wise to build a contingency allowance into your budget to allow for the unforeseen.



Select The Team

Select your in-house project coordinator

Be under no false illusions, if you try managing the project yourself, it will mean that you will take your eye off the day-to-day running of the business. It will add another responsibility to your already hectic workload. Having a single 'champion' for the office fit-out can put your mind at ease, knowing that your responsibilities are under control and going to plan.

Select your in-house team

The relocation or reorganisation of your business calls for input from every employee, manager and director. While you must listen to personal whims and concerns, your key and primary focus must be on the operation of your business, including HR, Finance, IT and communications, Health & Safety, and legal issues. You should look to include as many of the following personal in the organisation of the new office:

- Managing Director
- Financial Director
- Facilities Director
- Office Manager
- IT Director
- Operations Director
- Marketing Team
- Human Resources
- Administration and PA's

Commercial agent

Your property consultant will have a considerable impact on the project and your potential exposure to liability. The brief you provide to your agent will be key to ensuring you obtain appropriate and relevant advice at an early stage.

Your commercial agent should be able to:

- Assess your current building and the implications of your organisation vacating the property
- Draw up a shortlist of suitable premises
- Analyse the financial implications of each property
- Assist in the selection process
- Negotiate on your behalf
- Draw up heads of terms and finalise the lease.

Top Tip

When meeting with commercial agents, you will need to have open and frank discussions about your business and its financial performance. There are often issues connected with a building that will produce negotiation points at the stage when terms are being agreed. For example, if the space being offered has an inefficient floor plate, you may need to take a greater area to compensate. In this instance, your agent may be able to negotiate a reduction in rent – or (more likely) a rent-free period or fit-out contribution – to reflect this scenario.

Consider who else needs to be involved:

Specific contractors

Be careful to understand the implications and financial effects of any preferred suppliers or maintenance contracts that the landlord has already set in place.

Specific building managers or facilities managers

If your office space is adjacent to or within a multi-tenanted building, you may need to involve the building managers or facilities managers within these organisations. This will apply particularly if the work is likely to be noisy, during working hours, or involve potential obstructions from large delivery vehicles.

Legal Representatives

The details of your lease will need to be closely scrutinised by your legal representatives.

What should you look for in a Design and Build Fit-out Specialist?

- Can do, will do attitude** – They should demonstrate that the challenges are being thought through and dealt with logically and have a genuine interest in the needs and aspirations of your business.
- Capability** – It would be disastrous if your project was found to be beyond the capability of the contractor. Similarly, avoid appointing a large company for whom your project is relatively insignificant.
- Workplace Consultancy** – Ensure that they can advise you on the best way to design the office to enhance employee performance and productivity.
- Case Studies** – At this stage, it is advisable to take time to carefully analyse previous projects and case studies that have been undertaken by your potential contractor. Ask for references of previous fit-outs and go and visit the offices to check the quality of work.
- Credentials** – Choose a specialist that has all the key disciplines in-house to fulfil your project including project management and space planning. Have they got ISO 9001 for Quality and Construction line accreditation?
- Financial stability** – Check out the financial stability of your D & B contractor which should provide a relatively accurate appraisal of their long-term viability.
- Health and Safety** – Carefully assess the competence in relation to Health and Safety of those managing your site because the penalties for getting this wrong are severe. Are they OHSAS 18001 accredited?
- Sustainability** – Check the environmental policy of the D & B specialist and ensure they have the necessary environmental credentials such as ISO 14001.
- DDA** – Are they aware of the Equality Act 2010 and the implications it will have on the workplace?
- Insurance** – Ensure that they have all the necessary insurance cover including Public Liability, Employers' Liability and Professional Indemnity insurance.



Design

The results from any workplace studies that have been carried out will provide the foundation to create an office that takes account of how your staff are making use of the current space and best reflects how they work. Establishing how your office interior will look is the exciting part.

The design process should include:

- ❑ **Brainstorming session** – A brainstorming session will allow identification of any problems with your current layout as well as providing ideas for creative solutions. It is a good idea to let your designer know the kind of design you like and the one that will reflect your organisation's image. There will sometimes be images from magazines or photos that will convey not only the styles or features that you appreciate but also those that you could not accept.
- ❑ **Block Planning** – An interior designer should start by producing block plans showing how your space could be allocated to get the best from your resources. If you have yet to decide upon a building, a block plan will help you assess the suitability of your shortlist.
- ❑ **Layout Drawings** – The designer should produce layout drawings using Autocad software showing the correct specification and placing of furniture to produce a harmonious environment that promotes health and safety, productivity and profit.
- ❑ **Technical Drawings** – as well as producing layout drawings the D & B specialist should produce detailed drawings showing bespoke fitments, mechanical and electrical wiring and air conditioning channelling.
- ❑ **Moodboards** – boards showing a variety of themes and colours, including fabrics and finishes will really help you and your colleagues to visualise how the new office will look, and gain a better understanding of the quality of the finished product.
- ❑ **Visuals** – Your D & B specialist will be able to provide you with CGI's of their design proposals. These should be of high quality, with the appearance of panoramic photographs of your space. They are an excellent way of communicating the design to staff and senior management and will help to create buy-in, and they'll probably have some really good ideas too.
- ❑ **3D Walkthroughs** – if you are serious then why not ask your D & B specialist to create a video walk-through of your new office. This can create some real impact if you need to create a WOW factor when presenting to the directors.



Sustainability

Sustainability issues have impacted business dealings across the world in the past few years. The sustainability of buildings has assumed a strategic importance and become much more significant in day-to-day business. Business premises are responsible for a high and rising percentage of carbon dioxide emissions and energy consumption.

There are a number of solutions that can help you to become more energy efficient. Some are more expensive than others.

- Green space planning and design** – Ensure that your D & B specialist incorporates sustainability into the design process from the very start. For example, consider locating staff round the perimeter of the office so they can open windows to cool down and enjoy natural daylight rather than utilizing electric lighting.
- Renewability** – demand that materials come from sustainably managed renewable sources, such as FSC (Forestry Stewardship Council) or PEFC (Programme for the Endorsement of Forest Certification) timber, which attract no price premium.
- Low-impact materials** – choose non-toxic, sustainably produced or recycled materials which require little energy to process. Water-based low VOC (volatile organic compounds) paints, for example.
- Recycled materials** – choose products which have been manufactured from recycled materials. Plastic furniture, seating fabrics, work surfaces, internal walls, partitions, insulation and floor finishes, for example. For details, start with the BRE Green Guide, www.greenbooklive.com or the British Council for Offices best practice guides.
- Lighting controls** – use Passive Infrared (PIR) Sensors and Daylight Detectors to switch lights off automatically when they aren't required.
- Energy efficiency** – use products which consume less energy, such as A+ grade appliances in the tea-points.
- Smart metering** – use hardware technology to identify when and where energy for heating, cooling, lighting and low power is wasted when the office isn't in use.
- Room booking** – use software technology to ensure meeting rooms aren't heated or cooled when they are empty.
- Sustainable Design Standards** – use an environmental assessment method such as Leadership in Energy and Environmental Design (LEED), Building Research Establishment Environmental Assessment Method (BREEAM) or the SKA Rating to measure and rate the environmental quality of your office fit out.
- Improvements to heating, cooling, ventilation and water heating** – consider modifying or replacing your building's HVAC system with low carbon technologies such as heat recovery or passive cooling. N.B. the cost of new HVAC plant and equipment can be offset through Enhanced Capital Allowances if the client selects components approved by The Carbon Trust.
- Luminaries** – install Light-Emitting Diode (LED) Lamps or T5 fluorescent lighting to enjoy the benefits of energy efficiency, longer product life and lower maintenance costs.

Controlling Stress in the Workplace

According to the HSE, stress at work may lead to high staff turnover, an increase in sickness absence, reduced work performance, poor time keeping and more customer complaints. Stress is the second-biggest cause of work-related illness in the UK after back-related issues, and costs employers some £400 million per year, while the side cost to society is reckoned to be £4 billion a year.

Think about ways that you can reduce stress in the workplace:

- The basics** - Ensure the basics necessities such as heat, light, ventilation, water, etc are easily available
- Task seating** - Ensure you have the best form of seating to avoid stress and tension.
- Introduce workplace wellness schemes** – consider creating a small gym in the office, or paying for a portion of employee’s gym memberships.
- Create social activity** – The more people enjoy their team at work, the better the atmosphere will be – and a better office atmosphere leads to productivity, creativity and collaboration.
- Provide a ‘Chill out’ space in the office** – Sometimes people need 15 minutes to relax, re-group and disengage from technology and general work related interactions. If you can provide comfortable seating you will find that a pleasant environment is good for boosting happiness.
- A bit of light relief** - If you have the room, a Ping-Pong or football table will go a long way to boosting employee morale too.
- The effect of colour** - Consider changing the colour of the walls (out with the sludge green and in with something fresher, cleaner and brighter), introduce some plants in the office, invest in some new pictures – even small changes like new office cutlery and kitchenware will make the working environment conducive to work.

Acoustics

Most open-plan offices still suffer from the distraction of noise. Ambient noise levels have been rising along with the population densities of open-plan spaces to the extent that noise intrusion has begun to impact on privacy and productivity. Consider the following ways to help control acoustics in the office:

- Furniture** – modular screens create workplaces where acoustic privacy is achieved; moveable screens offer immediate sound screening properties; acoustic foam linings can be fitted to seating; and sound absorption materials can be applied to storage systems
- Ceilings** – sound that travels over screened areas in your open-plan environment is most commonly reflected off ceilings, so there are suspended ceilings with special sound absorption qualities engineered in. Another method involves the use of overhead baffles, while another utilises suspended panels.
- Walls and windows** – sounds-absorbing wall panels work well with absorptive ceiling systems; wall-mounted acoustic foam-lined panels can feature as wall art; blinds can be made from low-emission fabrics (windows will be double or triple glazed) which absorb

reflected sound off window surfaces; and room dividers can have sound-absorption properties while having artistic appearances.

- Floors** – represent the largest continuous surface in any office, making significant contributions to unwanted noise. Acoustic absorption is typically provided through state-of-the-art carpet with a special backing.
- Noise masking systems** – applicable to certain environments, this system artificially introduces a low level of noise across a broad band of frequencies which is played by speakers in the ceiling void.

Top Tip

Sound is measured in terms of the frequency of the wave expressed in hertz (Hz) and the wavelength and pressure level expressed in decibels (dB). A whisper would normally register about 20 dB, a normal conversation would be 40 – 50 dB and a night club about 100 dB. The threshold for pain is 120 dB.

Ensure you have the most productive office through agile working

Agile working recognises that different activities require different environments and that throughout a working day employees undertake tasks that require different levels of collaboration and concentration. Rather than achieve everything from their own individual workstation or desk, the agile workplace empowers individuals to choose the setting to suit their activity. Consider creating the following areas in your new office:

- Private spaces
- Acoustic pods
- Town hall area
- Collaboration zones
- Formal meeting rooms
- Brainstorming areas
- Team work benches
- Sit-stand tables
- Chill-out and social areas
- Training spaces
- Atrium settings
- Informal meeting spaces
- Kitchen
- Cafe areas

Psychology of Colour

Colour is known to have an effect on morale and influence the level of activity of people. Consider the following colours in your new office:

- Red, Yellow and Orange** - energising colours and might be used in busy meeting rooms used for brainstorming sessions. However be aware that their over-use can lead to irrational and unpredictable behaviour!
- Blue and Purple** - both colours are associated with serenity and truth, and are a good choice for quiet rooms for contemplation and problem solving. Careful, because too much of these colours can have a cold effect.
- White and Grey** – often used in office environments as they are neutral, but the affect can be bland if they are over-used.
- Green** – a popular colour reflecting the physical creation and is often used to promote an image of the value of the environment.
- Black** – can be used to create a mood of solidity.



Fit-Out

Technology

The IT business moves at a ferocious rate, and it is often only months before recently-installed technology become out-of-date (but not redundant). Remember to consider the following when reviewing the relocation of your IT systems:

- IT Relocation Plan** - Work with your IT department to develop an IT Relocation plan. Who is going to manage the move of your IT and telephony, and make sure it all works?
- Disaster Recovery Plan** - Review the companies Disaster Recovery and Business Continuity Plan and update or amend these as necessary
- IT Requirements** - Establish your IT requirements for the new premises. Are there enough power points, floor boxes and data points? What are the internet and computer network requirements?
- Complete assessment** - Carry out a complete assessment of the new location including power supply, server room, cabling and trunking etc
- Backup** - If necessary back up all data and arrange off-site data storage as required
- Schedule the move** - Schedule the move weekend well in advance and ensure all required IT personnel are available
- Phone System review** - Review current phone system against future requirements. Do you need to upgrade or change your system?
- Telephone numbers** - Are you able to take your existing telephone number with you? Do you require a new phone number? Talk to your provider to make sure that there is no downtime, and no call goes unanswered.
- The cloud** - Consider how new technologies can improve productivity. The cloud provides many business benefits such as cost savings, flexibility and so on. It also provides threats and risks that must be considered and mitigated. Security is defined as confidentiality, integrity and availability and if you choose to put your business data on the cloud you need to be sure of a highly resilient network connection.
- Lead times** - Be clear about key dates (and lead times) with BT and other service providers. Installing telephone and data lines can have notoriously lengthy lead times – ensure you have sufficient order period prior to fixing your occupation date.

Project Management

- Site Set Up** – Your fit-out specialist will commence the site set-up procedure upon the agreed access date to the site or work area. The procedure will include Health and Safety, fire precautions, welfare facilities and protection of the existing building fabric, where necessary.
- Communication** – Be sure to identify clear lines of communication from the outset and never allow anyone without authority to instruct the fit-out specialist. This will only cause confusion and unnecessary cost.
- Site Progress Meetings** – Ensure that regular site progress meetings are held as they are an extremely effective tool for monitoring the project. An agenda for a site meeting should include:
 - Meeting date and time, attendees, and a review of previous meeting notes
 - Health and safety update
 - Environmental concerns
 - Review of programme
 - Finishes
 - Design amendments
 - Variations / cost changes
 - Progress payments
 - A walk about the site

Top Tip

The site meeting should include relevant specialists such as IT, removals or M & E consultants to ensure that all and any technical aspects are understood.

CDM Regulations

With the new Construction (Design and Management) Regulations 2015 which came into force on the 6th April 2015 there were a number of significant changes which affected the way Health and Safety is managed within the industry. Under these revised regulations the previous role of CDM co-ordinator is replaced by the role of 'Principal Designer'. And several previous duties are now the responsibility of the client.

The responsibility to coordinate the requirements of the CDM Regulations rests with you which means that you must:

- Appoint a Principal Designer and Principal Contractor in writing. The Principal Contractor and yourself will now be responsible for the management of Health and Safety risks arising from the project; duties which were previously undertaken by the CDM Co-ordinator
- Design Work - Ensure that the design work complies with regulations
- Compile a Construction Phase plan with the assistance of the Principal Contractor.
- Notify the HSE - If the project is notifiable (a project is notifiable if the construction phase will be longer than 30 construction days, with 20 or more workers or if the project exceeds 500 person days) then the HSE must be notified on Form F10.
- F10 Certificate - Ensure that the F10 certificate is on display and you are ready to receive HSE at any time to inspect Health and Safety on site.

Health and Safety

- Your responsibility - It is your responsibility to ensure the safety of all employees, contractors, visitors and anyone likely to come in contact with the site as far as is reasonably practicable.
- Familiarity - Ensure that you are familiar with the Health and Safety file for your new workplace
- Induction - Ensure that all contractors receive an induction before they commence work on site – be satisfied that they are aware of their responsibilities in complying with regulations, including welfare, working at heights, dealing with asbestos, access and accident reporting under RIDDOR.
- Monitoring - Monitor Health and Safety on site regularly to ensure you and your contractors are complying at all times.
- Qualifications - Ensure all contractors on site are appropriately qualified, i.e. Gas safe / Plasma.
- Welfare - Ensure that all welfare facilities are provided as per the CDM 2015 Regulations Schedule 2 including sanitary conveniences, washing facilities, drinking water, changing rooms, and facilities for rest.

Cost control

Your project may draw heavily on your financial resources so it is sensible to consider the following points:

- **Stage Payments** - Agree with your fit-out specialist up front a series of stage payments based on reaching certain defined progress milestones.
- **Mobilisation Payment** - The fit out specialist will require a mobilisation payment or deposit, so ensure that this can be paid well before the date when work on site is intended to start to enable your fit-out specialist to place orders for materials and labour.
- **Variations** - Ensure that a fixed price is provided for any variations for you to authorise.



The Actual Move

The relocation of your business assets and personnel can be a challenging proposition. Here are some points to consider when organising the move into your new office:

- The IT Equipment** - Do you need to speak to the IT and Telecoms company regarding the movement of technical equipment. Your IT and telecommunications equipment is key to the continued running of your business and the decommissioning and relocation of these items should be considered before anything else.
- Crates** - Organise all the necessary crates for everyone to move the belongings, and ensure you have plenty of labels.
- Occupation plan** - Make an occupation plan for the new office (who goes where and who gets what)
- Rota** - Prepare a rota for who will be where and when (ensure everyone has a copy with mobile numbers).
- Storage** - Consider your requirements for off-site storage and archiving requirements.
- Marketing material** - Liaise with the marketing team to ensure that all marketing collateral is updated including stationery, website and brochures etc.
- Communication plan** - Organise a communication plan to the staff, customers, suppliers and service providers.
- Walkthrough** - Schedule a walkthrough with your D & B specialist to look for snags

On arrival in the new office you should consider the following:

- You will need a test plan to check all equipment (phones, computers, networks, printers etc.)
- Check for condition of new offices on arrival (take photographs to validate move-in condition)
- Have a representative from each department on location during the move to ensure everything finds its right home as it gets delivered
- Set up a 'lost & found' area at both sites
- Keep a supply of refreshments available on both sites
- Distribute access cards and keys to all staff
- Ensure that the office relocation project leader signs off each part of the move.
- Create a welcome pack for the staff so that they know how to use the new offices. It may be appropriate to include such things as where the stationery is located, how to use the telephones and instructions as to how to set up the task chairs for example.
- Ensure that your fit out specialist provides the O & M manuals for advice on the products and services provided including the maintenance requirements for the equipment.

Once you have relocated into your new office ensure that you take some time to consider the following:

- Review** - Following your relocation or refit, it is essential that you review what you have achieved and measure this against your original objectives.
- Evaluate the partnership** - Evaluate how well your partnership with the fit-out specialist has worked.
- Consider the benefits** - Analyse the business benefits that you have achieved through the office fit-out, do they meet the objectives that you set out to achieve at the beginning?
- Other improvements?** - Discuss these with your D & B specialist as there may be further (quick and simple) enhancements that you can make that will further improve your working environment.
- Throw a party!** - Once you are enjoying your new working environment, it is an opportune time for publicity as you have something exciting to show your clients. Invite them to visit your new offices to see the investment you have made in your staff and clients.



If you are looking to carry out an office fit-out then speak to a member of the team at Office Principles who would love to discuss your individual requirements. Our phone number is 0118 975 9750.

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