



OFFICE RELOCATION CHECKLIST

Your step-by-step guide to managing the complexities of business relocation



CHECKLIST :

MANAGING AN OFFICE RELOCATION

Moving into a new office is an exciting thing. There's something really invigorating about a change of scenery. But if you're the one responsible for running it all, it can be a bit overwhelming.

The key to keeping it simple is to break it down into easy steps. We've listed everything you need to think about – from the beginning stages of the project to move-in day.

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Choosing a 'move' champion

About 12 months before you're planning to move, you should decide who's going to be involved, and start to outline your key requirements. Select a team and assign clear roles and responsibilities.

Who has what it takes to manage the move?

- Senior enough to make decisions
- Experienced at multi-tasking
- Good motivator
- Knows your business inside-out
- Great communicator
- Highly organised
- Good at sticking to a budget

Defining roles and responsibilities

Involving others and keeping people in the loop will prevent surprises and delays further down the line. For example, there's no reason to approve a design unless the MD has seen it - he or she is bound to change it.

- Managing Director
- Finance Director
- Facilities Director
- Office Manager
- IT Director
- Operations Director
- Marketing
- Human Resources
- PAs

RELOCATION TIP

Don't forget the administration staff. They probably know more about what's going on in your organisation than anyone else.

Engaging your stakeholders

In some instances, involving your staff is the law. The *Information & Consultation of Employees Regulations 2004* state that any changes directly affecting staff should be discussed with them. Unions should also be engaged as soon as possible.

Have you consulted with...

- Unions?
- Regulators?
- Parent company?
- Board members?
- Department heads?
- Staff?

Defining location priorities

You could find what you consider to be the perfect office, but if the location isn't right, then it just won't work for your company. Consider the following criteria when selecting locations for your new base:

- Good public transportation links
- Easy for clients to visit
- Easy for you to visit clients
- Realistic commute for existing employees
- Local amenities (shops, restaurants, pharmacies, etc.)
- Good access to major roadways
- Excellent access to major airports
- Access to a 'talent pool' of potential employees
- Parking

The project budget

A relocation project can be one of the most expensive events in the life of a business. Moving forward without a clear idea of budgets is like sailing without a compass. All reputable suppliers will provide full cost estimates, free of charge. This will enable you to communicate with the rest of your business the real financial impact of your move.

Get quotes for everything, and draw up a full budget for the whole project, including:

- Occupancy costs (such as rent, service charges, taxes, energy, maintenance, etc.)
- Transaction fees (for property agents, lawyers)
- Insurance costs
- Fire plan assessment
- Planning permission fees
- Design and fit out costs
- Environmental assessments
- IT - cabling, and IT equipment relocation fees
- Furniture - the cost of new furniture, delivery and installation
- Disposal costs (of old furniture, computers, rubbish)
- Extra security (during the move)
- Printing costs
- Telecoms - equipment and installation
- Marketing costs - new stationery, announcements, invitations, website update of new address, plus mail redirection
- Contingency (it is not uncommon to budget an extra 20% for contingencies and changes)
- Dilapidation costs for your old space (many leases require you to put your old space back to its original condition)
- Dilapidation costs for your new space
- Air conditioning, heating and ventilation (check the condition of the HVAC plant in your new building)
- Energy performance (not only do you have to budget for electricity and gas, but you also now have to consider 'green' regulations for your new space)
- Temporary storage during the move

Tax considerations

You're spending enough money for there to be plenty of opportunities for tax breaks.

Talk to an expert.

- Find out how to make the most of your Capital Allowances
- Look into leasing options for the design and fit out works
- Ask about Enhanced Capital Allowances for sustainable or 'green' equipment / products
- Look into interest free loans (if you are an SME) from The Carbon Trust¹

Commercial property agents

Make sure you're talking to the best people in the business.

- | | |
|--|--------------------------|
| Quality references | <input type="checkbox"/> |
| A good grasp of the technical side | <input type="checkbox"/> |
| Enough time to devote to your project | <input type="checkbox"/> |
| Good knowledge of the area you're searching in | <input type="checkbox"/> |
| National reach | <input type="checkbox"/> |
| Transparent fees and charges | <input type="checkbox"/> |

Office design and fit out companies²

The bulk of your costs will fall into the fit out and design category of your relocation. It makes sense to engage with a good office design / fit out consultancy at the early stages so you can plan ahead.

If you haven't selected your space, your office design consultancy can help you by calculating the amount of space you need - including all services and storage. Make sure you don't leave anything out, because if you end up with too little space, you'll have to move too soon. Too much space and you're throwing money away, every month.

If you've found your space, your office design / fit out partner can really help by surveying your new building, coming up with cost estimates and helping you visualise your new space. That way, you'll avoid any surprises later on.

Make sure you hire a design / fit out company that offers a complete 'turnkey' solution. It will save you time, money, and the hassle of having to manage multiple parties.

Check if they offer the following as part of their service:

- | | |
|--|--------------------------|
| Project management of your whole project, via one point of contact | <input type="checkbox"/> |
| Calculation of your space needs | <input type="checkbox"/> |
| Surveying of your new building | <input type="checkbox"/> |

¹ The Carbon Trust's website can be found at carbontrust.co.uk

² For more information, see our checklist *Choosing the right office design and fit out partner* at morganlovell.co.uk/useful-info/checklists/office-fit-out-checklist/

- Full cost estimates
- Space planning
- Interior design
- Fit out and construction
- Furniture selection and procurement
- Mechanical & electrical design and installation
- Air conditioning, heating and ventilation
- Plumbing
- Planning permission (will they arrange it for you?)
- Disabilities Discrimination Act (do they have enough knowledge so your new office will comply?)
- Health and safety
- IT cabling, moving and installation
- Telephone systems (do they have experience in putting in phone systems? Will they arrange (and guarantee a connection in time) with the phone company?)
- Move management (crates, packing and moving, plus furniture assembly)
- Do they work to a fixed budget?
- Will they guarantee on-time completion?
- Are they financially stable? (Could they absorb the cost of your build?)

RELOCATION TIP

Many small office design and build firms will fund the project with your deposit. Check the total project cost as a % of their annual turnover. If it's too high, your move could be at serious financial risk.

- Do they have the backing of a parent company?
- Do they have the purchasing power or partnerships to negotiate special deals?
- Have they managed relocations before (and for whom)?
- Can they help you define your requirements and put together your brief (through workplace appraisals, surveys, etc.)?
- Do they have their own health and safety experts?
- Are they environmentally conscious?
- Can they design and build a sustainable office for you?
- Do they have proper insurance in place?
- Are they willing to provide quality references?

- Will they arrange for you to visit other offices they've done?
- Does their team inspire your confidence and trust?
- Do they offer good value for money?

Feasibility studies

A well done feasibility study will save you thousands. Not only will it help you to determine how much space you need and how to accommodate your people, it will also help you plan for future growth (avoiding the need for an unplanned costly expansion or move).

A good office design consultancy should do this for you.

- Take a new look at how your teams work together (you might need to rearrange which department goes next to which)
- Work out growth rates for each department and plan for changes in your space plan
- How many people / workstations will you need to accommodate?
- What sorts of spaces (kitchen, executive offices, comms room, etc.) would you like?
- How much space do you think you'll need (in square feet)?
- What's your timeline?
- Calculate current size, capacity and usage needs for:
 - Reception areas
 - Meeting rooms
 - Executive offices
 - Presentation suites
 - Kitchen / tea points
 - Comms room
 - Break out spaces
 - Toilets
 - Showers
 - Copy areas
 - Mail room
 - Recycling points
 - Other (i.e. trading floor, library)

Storage considerations

Often overlooked, storage can make the difference between happy staff and grumbling workers. Office relocation is an opportune time to reassess and calculate your storage needs.

- What's your storage situation like at the moment? How much and what do you need for the new office?
- Storage for individuals - at desks or lockers
- Document storage
- Storerooms (for office supplies and equipment)
- Secure storage and safes
- Off-site storage
 - Can you reduce the amount of space you need by moving long-term storage off-site?
- Calculate future needs for all areas above
- Don't forget the basics - coat racks or closets

Environmentally friendly and sustainable offices³

- Consider a [BREEAM®](#)⁴ rating or some other environmental rating system
- Put energy efficiency at the forefront of the design
- Design in recycling points
- Maximise use of natural light
- Specify furniture with a high proportion of recycled content
- Choose fixtures, fittings and carpet with a high content of recycled materials, which can be recycled at their end of life
- Use paints with low amounts of toxins
- Only use timber that has been certified by the [FSC](#)⁵

3 For a step-by-step guide to producing a sustainable office interior, see our *Sustainable Office Design Checklist* at morganlovell.com/sustainability_checklist

4 BREEAM - The Building Research Establishment's Environmental Assessment Method

5 FSC - The Forest Stewardship Council

Communicating with your stakeholders

Confusion at the time of relocation can cause anxiety amongst staff. It will pay dividends to keep everyone involved and create buy-in for the move.

- Give people a way to voice their honest opinions and objections (such as an online forum)
- Provide access to an Extranet to share files and plans (for the project team)
- Hold formal presentations of design ideas for staff
- Go on site visits with key stakeholders
- Give staff tours of the office before it's finished
- Create a 'move' newsletter for staff
- Give staff an info pack on the new local area

Building surveys

A close look at your building can save you thousands down the road. For example, the heating and ventilation system may look good, but it may need a major upgrade. A good design and fit out company could survey your new space and at the same time estimate costs and timescales.

It is also critical to get some indicative designs drawn up at this point. It's the only way you can accurately estimate fit out costs.

Things to check:

- Condition (if it's an old building, is it actually possible to bring it up-to-date?)
- Flexibility (will it adapt easily, as your business evolves?)
- Disabled facilities (do you know what your responsibilities are?)
- Air conditioning (you may want to commission a special survey - if you share services with other companies, you should make sure you're getting your fair share of cool air)
- Lifts (can the lifts take goods and equipment? If not, you'll need to put extra money in your budget for the movers to carry things up stairs)
- What's new, second-hand, serviced or missing?
- Has the building been rated as energy efficient? (From 2008, the building will need an energy efficiency rating)
- Security (is the space secure? Check all windows, doors and hatches, and get the landlord to fix any problems)
- Fire plan
 - It's your responsibility to have an escape plan in place. At this point, you may want to check that you don't have to alter your new space to comply with fire regulations

Check for asbestos and other hazards and risks:

- Specialist audit
- Type III survey
- Risk assessment

IT and electrical

- Looking at the space, now is a good time to get an idea of the work that will be needed to install floor boxes and data points, and to run cabling

The neighbourhood

Are any competitors based nearby?

Are any potential partners based nearby?

Are the other tenants good quality companies?

Are there any off-putting noises, smells or other issues?

Are there issues with the local area?

Is there somewhere to buy a sandwich?

Legal and financial

Lease terms (any unusual clauses?)

Landlord incentives (any extra perks on offer?)

Have you negotiated a rent-free period?

Have you looked into future levels for service charges?

RELOCATION TIP

Ask your future landlord if there are any major upgrades planned to the building. Because you may have to pay for them in your future service charges!

Business rates

Make sure you don't overpay on your rates. Information is available from the Valuation Office Agency website⁶.

Get professional advice

Arrange for an audit rating

Look into local authority appeals

Talk to your new neighbours

Check empty / vacant rates

⁶ The Valuation Office Agency's website can be found at voa.gov.uk

Insurance

Make sure you have all the insurances in place before the work commences

Sign the lease

- Once all the terms are agreed to your satisfaction, sign on the dotted line

Drawing up the designs

Now it's time to take those indicative designs and produce a full layout (desks, meeting rooms, kitchens, comms room, IT, air con and heating)

Put together some mood boards - what look and feel are you going for?

Agree a colour scheme that reflects your brand and identity

Make sure your designs are compliant with all regulations (particularly the DDA, and the Workplace (Health, Safety & Welfare) Regulations 1992)

Arrange for 3D walkthroughs, if you can (it can be difficult to visualise the end result from a plan)

Is it possible to build sustainability into the designs? Will the office be energy efficient?

Finding the right furniture

It's not just about cost. There are things like health & safety and ergonomics to think about.

Is your furniture practical, for everyday work?

Are your chairs ergonomic?

Is everything covered by warranty?

Is it made from sustainable materials?

What will it cost to deliver or assemble?

Do you have enough storage?

Are you getting good quality for your money? The cheapest option isn't always the best, in the long run

Would you be better off renting, rather than buying?

Will your furniture work well with all your computers and other kinds of equipment?

Does the style suit your identity?

IT, data and computers

What sort of systems are already in place? Will all your equipment work properly?

What else will you need?

- Power points - how many and where?
- Floor boxes / data points - how many and where?
- Printers and faxes
- Comms room / cabinets
- Cabling
- Backup generator
- Servers
- Service and support
- IT management and coordination - who'll make sure it all works?

Telephones and internet

- Order your telephone connections from your telephony supplier as soon as possible
- Assess your current set-up (the pros and cons)
- Shop around for telephone providers and packages
- How many lines do you need?
- Could an internet-based system (VOIP) be better?
- Can you keep your current phone numbers?
- Do you need voicemail, or a call answering service?
- How will you let people know about your new numbers (mail-out, call forwarding)?
- Don't forget the basics - do you have enough handsets?

Health & safety

Health and safety is of paramount importance because you are responsible, even if you hire contractors. Make sure you work with companies with excellent health and safety credentials and processes.

Ask your appointed fit out contractor to provide you with health and safety assistance

Get someone to check out any health and safety file that may exist for your chosen building, and make sure it's up to date

Consider what arrangements you'd like contractors coming into your new premises to comply with:

- Parking
- Access
- Use of welfare

RELOCATION TIP

Try to hire a contractor with an in-house health and safety team. Some sub-contract, putting health and safety 'on the clock' and do as little as possible.

Appoint a CDM Coordinator, and a Principal Contractor if the project is notifiable

Liaise with the appointed safety representative, and any staff affected by the office move

Client communication

Make sure all your clients and suppliers know where you're moving, and when.

Send out a letter

Send out an email

Schedule an update to your company website

Schedule reprints of company stationery and forms

Work on site

Ensure environmental compliance

RELOCATION TIP

By law, you are required to keep a record of any waste that leaves the site. You are also responsible if one of your contractors doesn't dispose of waste properly (like dumping paint down the sewer drain). So make sure your contractor has excellent environmental credentials.

Recycle any plasterboard, carpet and other materials being stripped out

Separate waste (so as little waste as possible goes to landfill)

Follow the proper procedures to dispose of hazardous materials

Look into making your fit out carbon neutral

- You can now offset any carbon emissions from the work on your site. Talk to your design and fit out contractor about the options

Run weekly meetings, on site

Keep track of progress, with your project manager

Make sure there is a sign-off procedure for any changes

Take photos of the work at every stage, and make notes of any defects

Planning the move

Talk to your IT specialists about the transition (they may need time for testing)

Put someone in charge of managing the packing and de-clutter process

Make arrangements with your removals company

Check your new office is fully secure, for when things start arriving

Arrange all the crates and labels for packing up

Coordinate any holidays, making sure all the key people are available

Make sure all your staff know what's happening (when to clear their desks, what to tell clients, when to move, etc.) - they may need reminding!

Send out an internal newsletter with key dates for the staff

Arrange to have someone on-hand on the day, to help deal with snags or last-minute problems

Put proper security in place - at the old site, and at the new site (things could go missing amongst all the confusion)

De-clutter and getting rid of old equipment

There's no point paying to move anything you're not going to need.

- Get rid of any unnecessary clutter
- Clear out old files
- Scan documents you don't need in hard copy
- Dispose of any information securely (shredding, etc.)
- Donate any unwanted furniture, computers, appliances, etc., to charity
- Have plenty of extra bins and recycling points set up (it makes it easier for staff to clear out as well as encouraging recycling)
- Arrange for the removal of all rubbish

De-snagging and new office preparation

- Look for snags (schedule a thorough walkthrough with your contractor)
- Clean-up on site
- Thoroughly test everything - phones, computers, lights - one non-working handset can ruin your day
- Final handover
- Arrange supermarket delivery to the new office - tea, coffee, champagne?

Celebrating success

- Arrange a move-in party for staff and/or clients
- Take that long deserved holiday