

THE FIVE PHASES OF DEVELOPING NEW OFFICE SPACE

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GENERAL
MANAGEMENT

Perhaps there is no more difficult or disruptive event in the continuing operations of the professional firm than a move to a new location. The process is lengthy, extending from the commencement of evaluating new location options to the approval of the final punch-list items at a new facility. It also necessarily interferes with nearly all firm functions and must be carefully planned to enable the professional firm to continue to service clients and conduct its affairs during the periods when the movement of furnishings, equipment and personnel is set to take place.

This article describes the planning steps for the evaluation and development of new office space and provides a general guide based upon the five planning phases of a typical professional firm relocation.

Phase One

Phase One of an anticipated move is the **Site Evaluation and Programming Stage**. For an average size firm, the initial evaluation of possible sites should commence no later than eighteen months prior to an expected moving date.

The planning accomplished in this stage is an attempt to anticipate the needs and desires of the firm for several years to come, and thus a critical evaluation must be made of the cur-

rent firm activities and the implications of future growth potential. Before embarking on this initial phase, most firms will establish a committee of personnel to take responsibility for and make decisions regarding the intended move.

In dealing with interior designers and space planners at this stage, a professional office will typically have two options. The first alternative is for the professional firm to allow individual potential office buildings to commission space plans to be completed by each building owner's own selected space planners.

The second, and most often the better alternative, is for the professional office to retain the services of one design and space planning firm to evaluate all of the potential options on behalf of the professional office. This typically is also paid for by the buildings under consideration, but it allows one group of space planners to examine, evaluate and compare all space options on behalf of the professional firm client.

The first step in this initial process is for the firm to review the anticipated costs for relocation, tenant improvements, monthly lease rates and the related monthly operating costs. Given the budgetary considerations, the firm must then con-

template the nature and specifications of the type of space that the personnel would like to occupy.

Prime considerations are the location of the potential office building, the image and quality class desired, opportunities for growth within the facility, parking and accessibility and floor plate layout and adjacencies. Of further concern are the specific mechanical, structural and electrical systems that will be provided, including fire protection systems, maximum floor load capacity, electric load availability and floor plate location of building core facilities.

Often at this stage, a firm will have already settled upon their real estate broker and a single interior designer, and the interior designer will commence to conduct program interviews with firm personnel in an attempt to determine all of the then perceived attributes and inadequacies in the present space and the desired priorities for characteristics in a new facility. The interior designer will typically compile the results of such interviews and provide a written report, commonly referred to as the **Space Requirements Program**, to the applicable firm committee for evaluation and approval.

From the **Space Requirements Program**, the interior designer, in conjunction with the

real estate broker, will commence to evaluate the attributes of potential buildings, making feasibility and comparison studies of possible sites. Phase One typically ends when the site for relocation is selected and a lease is signed.

Phase Two

Phase Two is often referred to as **Schematic Design**. This entails the process of establishing a conceptual design within the firm's budgetary allocations. From the firm's approved Space Requirements Program, the prime factors typically considered by the designer, in conjunction with the firm's relocation committee, are the scope and nature of the tenant finish that will be accomplished.

This phase defines the character, function and aesthetics of the project and typically includes the intended composition and construction of the interior walls, the traffic patterns that will then be created, the type of visual design projected, be it contemporary, traditional or transitional, the positioning and nature of interior lighting, relevant acoustics, furniture selection and placement and the projected location of the various firm functional components such as computer facilities, secretarial stations, offices, conference rooms and the reception area.

During the Schematic Design Stage, the interior designer typically prepares initial architectur-

al base plans and elevations to guide the firm's relocation committee as to the planning of the new office. In addition, the relocation committee will examine finish colors and materials, together with furniture recommendations and potential signage and art placement.

The interior designer will coordinate the review of applicable building codes, and the building mechanical, H.V.A.C., structural and electrical systems with appropriate consultants for compatibility with the projected space plan. The interior designer will also typically review the projected budget and further detail the scheduling for the firm's relocation.

Phase Three

Phase Three is often referred to as the **Design Development Stage**. It is during this phase that the interior designer and the professional firm commence to envision in detail the layout, furnishings and function of each individual room of the new space.

With the general space plan created at the Schematic Design Stage as a base, specific decisions are now made regarding equipment location, lighting distribution, furniture placement, floor coverings, millwork specifications, special power and communication needs and design details of areas of the space. At this juncture, specifications are generally outlined for

the use and guidance of contractors who will be performing the tenant finish work and for the intended suppliers of fixtures and furnishings.

Often, the interior designer, at this stage, will create presentation documents. These presentation documents will include floor plans, drawings of special wall elevations indicating the design and materials to be used and detailed renderings of millwork. The space as a whole will be illustrated by perspective drawings which provide a three dimensional rendering of the completed plan. At this stage, the designer will again review projected costs and project scheduling.

Although it can be altered later at additional cost, the firm, at the conclusion of this phase, will typically decide on a space plan and conceptual design direction for the new facility. These will then, in turn, be communicated to the engineers and consultants for their review pursuant to the preparation of contract documents.

Phase Four

Phase Four is the **Contract Documents Phase**. The purpose of this phase is for the space planner to develop, and provide for the approval of the relocation committee, detailed contract drawings and the specifications for materials, finishes, colors and related items.

Upon approval, these contract drawings and specifications are then utilized to obtain contractors' bids and award contracts for the building-out and furnishing of the project. In conjunction with the contract documents, a project specifications manual is developed, providing written specifications for performance criteria, material type and quality and construction application procedures to be utilized during the tenant finish process.

Phase Five

Phase Five is Contract Administration. It is during this stage that the actual construc-

tion work is performed with the oversight and direction of the interior designer. Often, during this phase, a weekly meeting will be scheduled to be attended by the interior designer, the general contractor and a member of the relocation committee to review the budget and schedule, assess progress and remedy any deficiencies or problems.

On a continual basis, the interior designer will be responsible for coordinating the aspects of the project and communicating interpretations of the construction documents to the responsible contractors. Often, change orders will be developed

and priced by the contractors and, with the review and advice of the interior designer, submitted for acceptance by the relocation committee representative.

During and immediately after completion of the tenant finish, the interior designer will inspect the work to develop punch-lists. These lists are specific itemizations of deficiencies, or work not otherwise completed in conformance with the contract documents, and are submitted to the general contractor for correction or replacement. All punch-list items are typically completed prior to the professional firm's anticipated move-in date.

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Although the process can become involved and require substantial introspection as to how and in what environment a professional practice wants to continue its business, it is most often the case that the completion of a properly planned relocation of a professional office will be a positive experience for the entire business entity.

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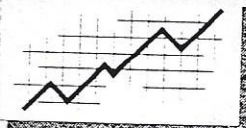
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