

Strategic Planning

1. Furniture standards analysis
2. Real estate performance metrics
3. Demographic analysis
4. Space needs analysis
5. Visioning sessions:
 - a. Corporate image
 - b. Growth projections
 - c. Space standards
 - d. Sustainability goals (i.e., LEED, Energy Star)

Real Estate Transaction Phase

1. Space programming
2. Space planner RFP process
3. Building evaluations
4. Incorporate sustainability initiatives
5. Project schedule
6. Site specific project budgets:
 - a. General contractor
 - b. Architect/Engineer
 - c. Permits
 - d. Furniture
 - e. Cabling
 - f. Audio/Visual
 - g. Security
 - h. Moving
 - i. Signage
7. Furniture vendor RFP
8. Draft work letter

Design Phase

1. LEED certification process or other “Green” initiatives
2. Meetings –Lead meetings with stakeholders, distribute and prepare meeting records noting action items and formalizing decisions
3. Lead design coordination meetings
4. Coordinate furniture vendor design
5. Coordinate power/data requirements for specialty equipment
6. Refine project budget
7. Refine project schedule
8. Review AE monthly pay applications
9. Track budget expenditures
10. Coordinate internal IT requirements on AV, cabling, security and server room cooling needs

11. Track early procurement/long-lead items list
12. Review and comment on design review and bidding documents

Construction Phase

1. General Contractor RFP process
2. Conduct pre-bid conference
 - a. Review and coordinate RFI with AE
3. Conduct pre-construction meeting to review project scope of work; confirm long lead time items are ordered such as telephone, doors/frames/hardware, light fixtures, HVAC equipment, carpet, ceiling tile, etc.
4. Coordinate special inspections contract
5. Review GC's monthly application for payment
6. Participate in weekly OAC (owner/architect/contractor) meetings
7. Conduct weekly site inspections
8. Escalate field coordination issues
9. Track budget expenditures
10. Monitor schedule to plan
11. Raise and resolve potential timing and budget issues
12. Review and comment on change order proposals
13. Attend punch-list meeting and coordinate execution of punch-list
14. Manage tenant improvement allowance reconciliation and reimbursement requests

Relocation Management and Tenant Vendor Installations

1. Moving company RFP process
2. Lead end-user planning meetings to define phasing strategies and identify critical interdependencies with schedule, sequencing and timing
3. Develop detailed relocation schedule
4. Furniture disposition RFP process if required
5. Propose files/storage transition plan
6. Prepare a "Move Manual" instructional guide for staff relocations
7. Manage the "Move Team":
 - a. Internal client lead
 - b. End user "Move Liaisons"
 - c. Internal IT team
 - d. AV
 - e. Security programming
 - f. Furniture
 - g. Signage
 - h. Moving and rigging specialists
 - i. Disposition/cleaning at origination site
 - j. Coffee and other vending services
8. Install placards and directional signage for move phases and installations.
9. Manage move vendor – on site management (weekends and nights).
10. Conduct (1) day, post-move fine tuning/punch-list process for each move phase.