



## Strategic Facility Planning Phase

- Conduct Client Workplace Strategy Sessions
- Advise on contemporary Workplace options
- Advise on contemporary Furniture solutions
- Develop Programmatic Requirements Docs
- Develop Design Narrative & Overview
- Conduct Expansion/Contraction Studies
- Process Work Flow Re-Engineering as req'd
- Conduct Developer Pre-Qualification
- Create Project Budget Formats
- Create Cash Flow Formats
- Create Preliminary Project Schedules
- Develop Facility Specification if Build to Suit
- Advise on Sustainability/LEED issues

## Transaction Support Phase

- Participate in Real Estate Strategy Sessions
- Develop Site Selection Criteria Matrix
- Tour Client space for issues to address
- Participate in Site Walk-through
- Conduct Building Evaluations. Due Diligence
- Evaluate Sites for embedded value/defects
- Develop comparative TI cost for each Site
- Note Base Building defects, remedies req'd
- Evaluate Lease for Construction Approach
- Review Landlord Proposed Costs
- Comment on/ Revise Tenant Work Letter
- Comment on/ Revise Facility Spec
- Negotiate Landlord / Tenant Costs
- Recommend/Negotiate Work Letter changes
- Concept Budgets/Schedules for each Site

## Project Team Composition Phase

- Advise on Project Team approaches
- Review/Apply Client Procurement Regs
- Ascertain approach to current Client partner
- Pre-Qualify Developers if Build-to-Suit
- Pre-Qualify Architects, General Contractors
- Develop/Distribute Request for Proposals
- Create Proposal Evaluation Criteria Matrices
- Review & Rank Proposals against Criteria
- Create Interview Evaluation Criteria Matrix
- Conduct Interviews and Partner De-Briefs
- Recommend selection where appropriate
- Negotiate Contracts for Client Execution
- Conduct Orientation for new Partners

## Design Control Phase

- Advise Internal Design Team
- Review A/E Contract Proposals
- Negotiate Final A/E Contracts
- Revise Facility Specification
- Confirm Equipment Requirements
- Review/Approve A/E Pay Application
- Preliminary Value Engineering
- Furniture Vendor RFP/Selection
- Issue Project Budget Updates
- Issue Project Schedule Updates

## Construction Control Phase

- Advise Client's Internal Project Team
- Direct activities of the Construction Team
- Review GC Contract & Cost Proposals
- Issue Project Budget & Schedule Updates
- Issue Cash Flow Projections
- Direct Engineering Value
- Attend Construction Site Meets
- Attend GC/Subs Meetings
- Conduct Weekly Site Inspections
- Resolve Field Coordination Issues
- Conduct Weekly Project Meeting
- Conduct Periodic Site Tours
- Punch List Walk-Through
- Document Weekly Activities/Action Items
- LEED Certification Processes

## Relocation Planning/Management

- Develop Relocation Strategy & Milestones
- Move Committee Composition & Training
- New & Re-Use Furniture Allocation
- Files/Storage Transition Strategy
- Move Vendor RFP/Recommend Vendor
- Negotiate Move Vendor Contract
- Direct Move Committee/Orientation Meets
- Manage Vendor Installations
- Placards and Directional Signage
- Origin & Destination Side Move Preparation
- Origin & Destination Side Move Coordination
- Fine Tuning & 3 Day Help Desk Support
- Move Vendor Close-Out
- Final Punch List/ Project Close-Out Activities
- Final Budget Reconciliation
- Lessons Learned & Post-Occupancy Audit