FIS

FINISHES & INTERIORS SECTOR

CLIENT GUIDE

OFFICE FIT-OUT AND REFURBISHMENT

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FINISHES & INTERIORS SECTOR

Finishes and Interiors Sector (FIS) was created to draw the finishes and interiors supply chain together to improve safety and quality, minimise risk, enhance productivity and help embrace innovation.

Our growing community of vetted members is made up of fit-out and specialist contractors, manufacturers and distributors involved in the supply and installation of ceilings, steel framing systems, operable walls, partitions, plastering, drylining and joinery products in every type of building.

Find a vetted FIS member by visiting **thefis.org/members-directory-landing-page/**

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FOREWORD

FIS has further developed this guide to assist clients in the sometimes complicated process of fitting out or refurbishing their offices and premises.

The situation post-Covid and Grenfell has fundamentally changed the way that business environments are used, with ever-increasing agile working and online meetings being the new norms, not the exceptions.

Regulation and changing responsibilities for all involved parties can appear daunting.

The authors of this guide understand that not all those involved or sanctioning projects are fully conversant with statutory rules, and may not be industry professionals. With this in mind, a step-by-step approach has been produced that clearly identifies all processes from initial concept to successful completion and handover.

PHILIP BROWN
FIS PRESIDENT

Six key things to consider right at the start

1	**CUSTOMERS**	Current and future staff, visitors and clients – people who might use and visit the space.
2	**CONTRACTORS**	Delivery team – the professionals and contractors you employ or commission to carry out the work.
3	**TRANSFORMATION**	What are you changing and what will be the effect on your business?
4	**WORLD VIEW**	Why are you considering this (is it voluntary or being imposed on you?) What do you hope to achieve? Can you achieve more?
5	**OWNER**	Who is driving this project? And who is making the final decisions (this might be a collection of people such as a board)? Has your 'champion' the time and authority needed?
6	**ENVIRONMENTAL CONSTRAINTS**	Cost, time, place and compliance with standards.

Not everything in this guide applies to every fit-out.

THE FIT-OUT AND REFURBISHMENT PROCESS

1	IDENTIFY WHY YOU NEED THIS FIT-OUT (STATEMENT OF NEED)	What are your main drivers for this fit-out? What can you achieve from it?
2	APPOINT A CHAMPION	Who will lead this for you in-house? Allocate time and support to them.
3	COMMUNICATE WITH STAFF AND CLIENTS	Decide communication channels – it is better they hear it from you rather than the rumour mill.
4	CONSIDER SEEKING PROFESSIONAL ADVICE	This could be a designer/architect, a design and build (D&B) contractor or an external project manager.
5	CARRY OUT BASIC RESEARCH	Tenancy and landlord restrictions; physical building; planning issues; surveys.
6	ESTABLISH A STRATEGIC BRIEF	Detail your principal requirements and constraints.
7	CARRY OUT A FEASIBILITY STUDY	Are your plans possible given the building, location, tenancy and finances?
8	MAKE A DECISION	Do nothing; refurbish/fit-out; move/stay. Select building type; location; fit-out process; estimate budget; identify your priorities.
9	APPOINT A CONSULTANT	Traditional route usually begins with an architect or designer. Establish who the principal designer will be. A D&B contractor will do the design for you.

TRADITIONAL

10	RESEARCH TO INFORM DESIGN	Staff surveys; observations; business plans; brand; working practices.
11	PROJECT BRIEF	Collation of research results and relevant information.
12	DESIGN	Concept to detailed developed design.
13	SPECIFICATION	Materials and workmanship; standards.
14	TENDERING	How will you tender and evaluate? Will some elements be excluded?
15	CONTRACT AND FEES	Contract type; mobilisation; start; completion; guarantees.

D&B

ALL-INCLUSIVE PRICE

Research; space planning; design; programming and phasing; specification; costing.

16	CONSTRUCTION	Planning permission; building control; licence for alterations; access, parking; security; hoardings; site office, regulations; health and safety; ingress and egress.
17	OCCUPANCY (HANDOVER)	Snagging; insurance; move management; manuals; training; welcome party!
18	POST-OCCUPANCY	Soft Landings; reviews.

IDENTIFY WHY YOU NEED THIS FIT-OUT 1

The first stage of any fit-out or refurbishment is to be clear about the motivation for change and what you are trying to achieve.

You might need to:

- Refurbish a tired office
- Move because your lease is up
- Use more space if you are expanding
- Use less space if you are contracting
- Make changes to accomodate new flexible working practices
- Launch a new business line
- Take over another business
- Consolidate several businesses
- Rebrand
- Attract or retain valued staff.

Whatever the main reason for your fit-out, consider it an opportunity to make other improvements. For example, an office fit-out can help introduce a new company culture or reinforce your core values.

Creating the office fit-out that suits your business, your customers and your staff – and having it happen on time, to specification and to budget – can seem daunting. But there are experts who can help you avoid the mistakes others have made and ensure you benefit from the examples of the best. Planning is key.

The first step is to ensure you have board-level buy-in, with clearly defined priorities about what you want to achieve, and the budget available.

You will also need to work out what the impact may be on your business, especially if there is going to be a period of working in the same building while the fit-out works are ongoing. You will need to complete your own risk assessment.

In general, a fit-out project begins with a statement of need that is worked up into a more detailed strategic brief, often with the help of a consultant/designer/architect. At this stage, whether you choose the traditional contracting route (hiring a designer/architect, a QS and main contractor) or a design and build (D&B) contractor who will do all of this in house, you will need to appoint a lead consultant to help develop the project brief. You may also need to carry out surveys and a feasibility study.

The project brief will inform a design process that will involve a concept design and then a detailed design (or developed design), but may include several separate stages. It is vital to get this right as it will define your new office. The design will inform a specification document that will trigger a round of tendering before the construction begins.

Fit-outs should not stop with handover but continue with aftercare during your occupancy – this is part of a process called 'Soft Landings'.

The one lesson you will hear repeatedly is that the more decisions you get right early in the process, the better the outcome will be – and the more cost-effective. Changes later will cause delays, add to the cost and may jeopardise your desired outcome.

This guide is to help you identify the issues you might need to consider at each stage and to give a more detailed view of the process your contractors, consultants and specialists are following.

Not everything in this guide will apply to every fit-out, but it should help you make your new office a great place to work, occupied on time, to specification and to a budget you can afford.

QUESTIONS TO ASK	
How will the fit-out improve your business outcomes?	**How will it improve the performance of your people?**
Do you have a robust business case?	**Do you have a set of measurable benefits that the project should deliver?**
What are the metrics you will use to determine its success?	**Do you have a realistic project delivery plan?**
Do you understand the key risks and dependencies?	**Do you know how much space you need in the future?**
What do you consider a successful fit-out to be?	**Do you have the board's agreement to proceed?**
Do you plan to introduce more flexible working practices?	**Do you need to accomodate all your staff in the office at one time?**

APPOINT A PROJECT CHAMPION 2

Every project needs a champion from within the company. You need someone with the skills and authority to sign contracts on your behalf and spend money when it is needed. The ability to communicate and to motivate those around them will be crucial. There is likely to be disruption and possible change for staff so your project leader must be able to engage with all staff and win over doubters. Many people call this person the fit-out 'champion'. Ideally, they'll be keen to run this project – a volunteer is worth ten pressed men.

THINGS TO CONSIDER

WHAT SKILLS DO YOU HAVE IN-HOUSE (HR/FM/IT) AND HAS ANYONE MANAGED A FIT-OUT BEFORE?
You may have a facilities manager and a human resources department and have several people with the project management skills to lead a project such as this. You may even have a board member who has had experience of overseeing a similar project in the past. Alternatively hire an external expert to guide you or manage the project.

WHO ARE THEY GOING TO REPORT TO AND WHO IS GOING TO REPORT TO THEM?
You may want the project champion to report to a sub-group of the main board and have key staff on their team, such as HR, FM and IT. You might also include marketing, if you need your building to give the right impression to visitors, for example.

HAVE YOU ALLOCATED ADEQUATE TIME AND RESOURCES TO THE PROJECT CHAMPION?
Whoever you allocate to the task is going to need to devote a substantial part of their working week to the project and will need their other business tasks to be done by somebody else. If you have a supporting committee for that project leader, make sure they too are allocated the time and resources to provide the full support required.

HAVE YOU EMPOWERED THEM TO MAKE DECISIONS?
Some decisions might need to be made quickly – make sure the right person has the authority and budgetary control to make those decisions. They will also need the authority to spend contingency funds if necessary.

"Appoint move champions from within each team as they are a critical interface between the business and the project delivery team."

COMMUNICATE WITH STAFF AND CLIENTS 3

Good communication with staff is vital. People often resist change, so motivating staff and managing expectations will be essential. Decide the best way to update progress to your workforce and manage their expectations. You may be required to consult with trade unions but you will also want to involve staff not covered by collective bargaining, especially where a move to a new facility may require revised travel arrangements.

Ensure staff from all departments and at all levels are consulted and kept informed and consider establishing a method of measuring the impact on the business and staff during and after the fit-out. You might have surveys, a staff consultative panel, a newsletter, email bulletin or an intranet site. You might have regular Q&A sessions, a suggestion box or regular staff meetings. You might hire an external consultant to observe and measure the impact on staff.

Don't forget the directors. It has been known for a director to insist that a much smaller office would be fine, only to move in and complain instantly that the new, slimline room was unworkable. That's an expensive problem to fix.

STAFF – KEY POINTS TO CONSIDER
COMMUNICATION Consultation, research, views, ideas, suggestions, likes and dislikes; plus feedback, notice, necessary warnings and clear instructions
MEASURE Space usage, activity, communication, work flows, storage needs, absenteeism, staff turnover, productivity
SUPPORT Change management, smart ways of working, training, company culture, core values

Whatever demands, needs or wishes are expressed by staff at all levels, challenge them, compare them with external benchmarks and test them – maybe make the director work in a small office for a few weeks to check if it is acceptable in practice, not just theory.

Also, think about your clients and suppliers. Decide how best to keep them informed to avoid misunderstanding and to win their support. Listen to their concerns too.

"Taking time to consult with your staff and involve them throughout the fit-out and relocation process will result in an improved experience for both them and the professional team."

CONSIDER SEEKING PROFESSIONAL ADVICE 4

An external expert's input can be transformative. Who you speak to will depend on your in-house skills and the way you want the project to run. But before you make any decisions consider taking external advice. Whether you choose an architect or a designer or a top-to-tail design and build (D&B) contractor, all will want to speak to you at the earliest stage possible. If you or your staff have particular concerns that will need to be addressed, you might also want to speak to key specialists, such as an acoustician, IT expert or audio-visual engineer.

Hire external help as early in your project as you can. While you may feel comfortable doing much of the preparation work yourself, it is likely that whoever you decide to work with in the future, and whatever contracting route you choose, your external adviser will want to carry out key aspects of research and preparation themselves. This may mean some work will be duplicated.

External help also brings in wider experience, examples of projects that have worked well or gone wrong, and ideas that you have not considered. Your external consultant may help you analyse your current or potential buildings and help provide condition surveys and do due diligence.

An external consultant may also help challenge accepted norms or better manage expectations. A message from an independent expert may be more palatable to staff than if it came from the management, while an opinion from an expert might carry more weight with management than if it comes from a line manager.

Note that there is a legal term 'principal designer' used in CDM regulations. This person may be your designer, architect or another competent person. If you appoint specialist design help now, that person is likely to become your principal designer. You may not need another recruit in the D&B contractor route, as they can fulfil this role. Someone will have to be named principal designer.

Many professionals have specific qualifications and must provide updated evidence of their skills, knowledge experience and behaviour then demonstrate that they take part in continuing professional development (CPD) to demonstrate their competence. Some are even regulated by a professional body. Others belong to recognised trade associations with codes of conduct or best practice.

These can be helpful in identifying the right professionals. But many jobs, or job titles, are not exclusive to those with certain qualifications or members of certain bodies. And many consultants may offer services covering several specialist skills, you might not need to employ them all individually. See APPENDIX I for more details. See also APPOINT A CONSULTANT (page 21).

WHAT SPECIALIST HELP IS AVAILABLE?	
Acoustician	**Architect**
AV consultant	**Building services engineer**
Building surveyor	**Clerk of works or compliance officer**
Design and build (D&B) contractor	**Designer**
Environmental consultant	**Fire consultant**
IT consultant	**Lawyer**
Principal contractor	**Niche specialist**
Project manager	**Quantity surveyor (QS / PQS)**
Space planner	**Specialist subcontractor**
Structural engineer	**Workplace consultant**
See APPENDIX I for a list of what each specialist does.	

CARRY OUT BASIC RESEARCH 5

There's an old adage that stealing from one is plagiarism but stealing from many is research. The more research you do, the more ideas you will have and the clearer you will be about what you want and how you will achieve it. Your external consultant will bring experience of their own that may be helpful too. Here are some things to think about...

5.1 Do you just need a refresh or a complete refit?

Office fit-outs can be Cat (category) A or B. Cat A includes floors, ceilings and often the mechanical and electrical engineering (M&E) required to operate the building, such as heating and ventilation, fire detection and security systems, electricals and telecoms. This is usually carried out by a landlord or developer during the building or refurbishment stage prior to occupation. A Cat B fit-out may use the existing floors, ceilings and M&E, with perhaps new partition walls, office layouts, changes of use, branding, decoration, carpets, lighting, IT and audio-visual (AV). This is the most common type of office fit-out, anything less than this is a refresh or refurbishment. In some major cases the project may include elements of 'Shell and Core' such as external cladding, lobby and reception areas, lifts and stairs, plus toilets.

5.2 Is your current building fit for purpose or should you move?

It's not just about having enough space or your current lease running out.

Is the location still correct?
Neighbourhoods change over time and locations may become noisier, dirtier or harder to reach because of traffic congestion. Your building may give an impression at odds with the brand values you wish to convey. Can you achieve the fit-out you want in your current building? For example, you can lower a ceiling but you can't raise the ceiling where the building fabric won't allow it.

Do you have any special requirements (physical or administrative) that would restrict the fit-out/location/building type of your office?
If you have staff who need quiet working but who prefer natural ventilation (open windows), a busy city-centre location with traffic and noisy passers-by is not going to be best for you. Another example might be the requirement for an unusually heavy piece of furniture/equipment, such as a document safe or rolling storage, that might be too heavy for the existing flooring. You might require 24-hour access to your office but have a landlord who does not permit it.

5.3 Do you have enough storage space?

Consider a storage audit to identify how much storage you need and what sort of access you require. Firms often need to store more than they imagined and lack of storage space can present fire and other health and safety risks. It can also mean extracting items from storage can take longer and waste time.

A TYPICAL CAT B FIT-OUT COULD INCLUDE:

Artwork	**Cabling**	**Decorating**
Doors	**Drylining / drywalling**	**Flooring**
Furniture fittings and equipment (FF&E)	**Heating, ventilation and air conditioning (HVAC)**	**Joinery**
Kitchens and breakout areas	**Lighting**	**Mechanical and electrical engineering (M&E)**
Mezzanine floors	**Operable walls**	**Partitions**
Plants and shrubbery	**Plastering**	**Raised access floors**
Rendering	**Screed**	**Secondary glazing**
Signage and wayfinding	**Steel-framed systems**	**Storage systems**
Storage walls	**Structural glazing and balustrading**	**Suspended ceilings**
Telecoms	**Tiling - walls and floors**	**Window film and blinds**

The FIS member directory may help find a specialist subcontractor.
www.thefis.org/member-directory

5.4 Have you considered the benefits of your fit-out meeting environmental and sustainability targets?

The construction industry is hugely wasteful, resource intensive and responsible for an estimated 50% of the UK carbon emissions. These inefficiencies are not only bad for the environment but can also be very costly: the Green Construction board estimates that the cost of wastes from new build construction is £11billion per year.

In response to this challenge and growing realisation that the impact need to decrease, the number of buildings assessed to green building standards, such as BREEAM, LEED, Well, Ska or Nabers, is increasing. Those standards have different focus on the issues they look to address, but in general provide a scorecard to evaluate the environmental performances of fit-outs and buildings. They target issues, such as reduction of energy demand (operational impact), materials impact (eg embodied carbon and responsible sourcing), waste reduction, health and wellbeing of the occupants (daylighting, indoor air quality, acoustics, biophilia).

In addition, the discussion around net zero has started to take real momentum. Net Zero drives the need to reduce both the embodied and operational carbon of buildings with the remaining emissions being offset. In 2023, a standard on net zero building is expected to be published. The drivers for sustainability originate from various sources but is in part driven by clients making commitments to reduce their impact. An initiative led by the Better Building Partnership has been signed by 37 major real estate owners and shows their commitment to reduce their environmental impact.

Circular economy is also worth considering. Circular economy is not defined by one indicator at the point of writing but can basically be summarised by the concept of moving away from our current economic model of extracting, manufacturing, using and disposing. It considers wider issues than just carbon and considers how we can make more efficient use of the materials we use by: using less products, reducing wastes on site during installation, repairing rather than replacing damaged products, reusing products that often come out of a fit out project before then end of their useful life. Carrying out a pre-strip out audit to establish the quantities of products that will be taken out and their potential for high value recycle or reuse is optimised should be part of all projects.

Finally social value is recognised as an important consideration. The human aspect of sustainability is often forgotten but is hugely important. Firstly, because we build buildings for people and therefore we need to make sure they are fit for purpose, and aspects such as indoor air quality or acoustics are considered. Secondly, the industry buys large amount of products and it is important to consider where they come from (eg legally sourced timber should be a minimum standard). And finally, ensuring issues related to modern slavery, fairness, inclusion and respect is part of the companies delivering the work.

"Do you know how much space you need for your people to perform their roles and tasks efficiently and effectively? Capture data on the usage of your workplace over a period of 5 to 10 days to understand desk, meeting room, collaborative and break-out space usage. Understand the latent potential within your people to work in a more mobile and agile way."

5.5 Is accessibility to staff and customers important to you?

All fit-outs must adhere to current Building Regulations and part M covers access to and use of buildings. All businesses must comply with the Equality Act (2010) which consolidated the Disability Discrimination Act with other equality legislation. But these are minimum standards and you may wish to go beyond that. An access consultant – a National Register of Access Consultants (NRAC) was established with government backing in 1999 – would provide an audit as well as design advice. This is not just about wheelchair access but lighting, colours, materials used, how doors open and close and how the office works for a whole range of people. There are awards for offices with better accessibility. The charity for those with sight loss, the RNIB, for example, is looking to introduce its 'RNIB Approved' validation for buildings.

5.6 Are there other corporate social responsibility (CSR) issues your fit-out contractor must address?

If you have other CSR initiatives you support, such as paying the Living Wage, adhering to the Prompt Payment Code, or avoiding products made from sweatshop labour, you might want to consider specifying that materials meet BES 6001: ISSUE 2.0 Framework Standard for the Responsible Sourcing of Construction Products.

5.7 Do you need to survey the building first?

Some buildings will require a survey for asbestos (it was widely used in buildings built or refurbished between 1950 and 1980 and any building built before 1999 may need a survey). You may also need to survey for lead pipes and paint. Legionella risks should also be identified and dealt with. Find out what surveys have previously been carried out and decide whether you are confident to rely on those. Asbestos will require a specialist contractor and licence to remove it.

But you may also need to identify what existing systems are in place, such as the mechanical and electrical engineering (M&E), furniture, fixtures and equipment (FF&E) and storage facilities. A survey might also discover other hidden problems, such as non-compliant compartmentation and fire doors, leaks, damp, damaged utilities or services, or mistakes made by previous tenants. Some of these may require you to negotiate terms with the landlord to cover the cost of putting them right. You may also want to survey the sustainability of the building, in terms of its energy and water use.

You will need an asset register, identifying what will move with you and what will be replaced, refurbished, recylcled and disposed of. Internally you will need to survey your staff (as part of a wider consultation strategy) and identify your own needs, not just for office and breakout space but for storage and filing, IT servers, kitchens, toilets and showers.

Some buildings will have up-to-date information available from recent surveys or from Building Information Modelling (BIM) data. Others may need checking. Belatedly discovering problems that a survey could have identified will add delays and costs.

5.8 Will you need planning permission (change of use/ modifications/listed building etc)?

You must contact your local council. If your fit-out is making any physical changes to the structure of the building, or if you are proposing a change of use for the building, or any part of the building is listed, for example, you will need planning permission before you can start. If your building is listed or has other heritage status, you may need clarification or permission from Historic England, for example, for certain changes, or may be prevented from making key alternations.

5.9 What finance options are available?

There are generally three finance options for consideration when looking to relocate or refurbish an office: cash, bank facilities or lease finance.

Most businesses don't realise leasing is available for a fit-out project but would not think twice about leasing items such as company vehicles or IT. It is estimated that 98 out of the UK's top 100 companies lease capital goods.

Leasing is a smart method of finance that allows you to 'rent' your project and offset the payments against taxable profit. You can pay over three, four or five years to suit your budget and the lease on your building.

Anyone who runs a business can lease, from start-ups or small SMEs to limited companies and PLCs and for projects ranging from £50,000 to multi-million pound projects.

Benefits of leasing

- **Payments are 100% tax allowable**
  If you lease your furniture and refurbishment project, payments are 100% tax allowable which means they can be set against company profit. It is the only way a project can be fully offset and makes leasing the most tax efficient method of financing your office project. It can even work out cheaper than paying cash!
- **Fixed payments for accurate budgeting and forecasting**
  Unlike other methods of finance such as floating rate bank loans and overdrafts, payments are fixed for the duration of the lease period allowing you to budget effectively and with certainty. It also provides you with a hedge against further rises in inflation.
- **Get the right solution now**
  By spreading the cost over three, four or five years you can acquire the solution that fully meets your needs now, rather than being restricted by your current capital budget.
- **Ease cashflow**
  In most cases we can arrange a lease facility with no deposit, having little impact on your cash flow.
- **Preserve borrowing power**
  Leasing means you preserve your existing bank credit lines, without compromising future working capital, leaving them available for future business development or investment purposes.

5.10 Are there any grants or other concessions available?

There may be government grants (central or local) for parts of your fit-out (particularly for green initiatives). Or it may be possible to secure funding for specific elements from other grant

givers (lottery, charities, heritage bodies etc). Your landlord may be prepared to contribute, either directly or through a rent holiday, if some of your upgrades will benefit the building. There may be specific tax allowances you can claim on elements of the fit-out.

5.11 Will you move out completely or refurb while working alongside?

Keep temporary movement to a minimum and move each team at a time least disruptive to them. Traditionally moves take place at weekends but there may be weekend workers who will be affected. Plan to ensure continuity.

5.12 When is the least disruptive time for the fit-out to happen or for an office move to begin/finish?

If you have seasonal rushes and lulls in workload, time any disruption for one of the lulls. Work out how the handover and occupancy will impact on staff and how that will be managed.

5.13 What access will the fit-out contractors have to the building and who will arrange for parking/road closures/ authorisations?

You will need to clarify what level of access to the building your contractors will have, what entrances and lifts they can use and during what hours they may have access. You will also need to be aware of external restrictions on access, such as parking restrictions, height or width restrictions on access roads. Find out who can issue permits to park or to suspend parking restrictions temporarily or clear the streets to enable specific deliveries or works vehicles.

5.14 Who checks Building Regulations?

To help ensure that work complies with the Building Regulations, those responsible for building work may need to use one of the two types of building control body:

- A local authority building control body (for further information see Chapter B in Volume 2 of the Manual to the Building Regulations)
- An approved inspector (for further information see Chapter E in Volume 2 of the Manual to the Building Regulations).

The Building Safety Act introduces the pre-construction gateway (Gateway 2) to demonstrate that the design works and sufficient control is in place to maintain the integrity of the design through the construction process.

The initial requirement at Gateway 2 is to demonstrate that proposals comply with building regulations requirements. The guidance emphasise that all plans and documents must be realistic for the building and not rely on unreasonable assumptions about the occupied building once built. This includes management, maintenance and behaviours and characteristics of residents or other users.

Building regulations approval is different from planning permission. Be aware that you might need both.

5.15 What restrictions will your landlord (or their superior-landlord) place on you?

As a first step, contact your landlord and find out what processes or restrictions might be placed on your fit-out. How have past fit-outs worked? What does your lease specify? You will need a licence for alterations covering the specifics of the work involved, so check if there are likely to be major restrictions. Your landlord may need to speak to a superior-landlord who block-leases to them. They, in turn, may need to speak to a freeholder, who may have to seek approval from investors.

You will also need to be clear if there are any other fit-outs likely to be happening at the same time and what conflicts or additional restrictions that might cause. Check the insurance arrangements and find out if there are any special conditions imposed on contractors or on elements of the proposed fit-out.

Get a dilapidations schedule from your landlord so you know early on what will be needed to return your current building to its original state or what you must pay.

CONSIDER THE BUILDING AND LOCATION
Move or stay?
Access for staff and clients
Brand perception
Meeting the short, medium and long-term business aims and plans
Flexible lease space
Meeting sustainability requirements
Capability and capacity of M&E services


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4:50

ESTABLISH A STRATEGIC BRIEF 6

Now it is time to get more details into your plans. Your research should feed into a strategic brief document that clearly sets out what you want to achieve.

6.1 What process can you use?

RIBA (Royal Institute of British Architects) operates a Plan of Work seven-stage process from preparation to use and aftercare. There are four possible design stages: concept design, developed design, technical design and specialist design.

RICS (Royal Institution of Chartered Surveyors) runs the SKA environmental standard for fit-out.

Digital construction information as part of a modern collaborative construction methodology using information-rich data and process, can allow for demonstration of designs using virtual reality and augmented reality. New buildings, and in some cases older buildings may have digital data. Even where no data exists you should consider that your fit-out captures information about the products used and how to maintain them using a golden thread of information.

Soft Landings is a process developed by the Building Services Research and Information Association (BSRIA) to help reduce the gap between the actual performance of buildings and their expected performance during design. It demands a period of initial aftercare with the project team on site followed by a period of a year or more when they can be called in to fix bugs. There is a project review no earlier than a year after occupancy.

The British Council for Offices has a guide to fit-out, plus several specialist guides to elements of a fit-out, such as lighting and ventilation, specification and selection of construction materials.

6.2 Can you produce an outline scope of the work?

The more your fit-out can be scoped out, the better. Your contractor must be clear on the extent of the works and the extent to which they will impact on the existing building. Your contractor might be required to work alongside other contractors. The practicalities, such as delivery of kit, testing of systems, methodology and interaction of works, will need to be considered before your contractor can accurately price and programme the fit-out works.

6.3 How can you establish a realistic budget and timeline?

This will involve producing an outline scope of the work required, calculating how long it will take to complete – bearing in mind all the restrictions and limitations in place – and costing it.

Few organisations can afford to fully adopt this incremental budgeting process, and may be working to a fixed budget, but it is worth ensuring that the budget you set will achieve your 'must haves'. Don't pluck a figure out of thin air – talk to an expert who can give you guide prices for the type of fit-out you require which will be based on square metres of floor space (m^2). The letting agent of your building might know what other tenants spent. If you have visited offices recently fitted out, get the price they paid and compare the scope of your fit-out with theirs.

Bear in mind that most quotes you get will be net of VAT.

6.4 Will you use a design and build (D&B) contractor to manage the process or use a designer/architect with your own quantity surveyor?

You might hire a designer/architect to develop and manage the project, plus your own quantity surveyor to monitor and validate the costs, and then select a contractor to manage the works. The alternative is a design and build (D&B) contractor, who will have access to their own designer, either internally or preferred contractors, and will manage the entire project from start to finish. You might have an initial design from an architect and then hire a D&B contractor. Agree the fees to be paid and the payment triggers – these may align with project milestones or specific dates, so establish at least a draft timetable. You may be expected to pay some money up front. If you are deviating from standard contracts (which are explained later), be aware of the potential risks.

6.5 Will you retain elements outside the main contract?

Some clients prefer to keep the furniture and IT contracts separate, believing the mark-up the contractor makes when bundling these elements in to the main contract is not worth it. However, the mark-up is often only single figure percentage points and managing the procurement yourself can easily cost more than that.

Others keep significant elements outside the main contract for different reasons. In our case study, the structural engineering element of the fit-out was retained as a separate contract (see page 37). Bear in mind the legal and insurance issues if you choose to do this.

CARRY OUT A FEASIBILITY STUDY 7

At this stage consider if you need a feasibility study. Not every fit-out will, but identifying problems early can save a fortune later. A thorough examination of the potential opportunities and pitfalls of your fit-out options might save money by helping you avoid making the wrong choices.

You might, for example, find that the office you want would be significantly more expensive in one building than another, or that planning permission would likely be refused. It might also help identity which elements are 'must have' and which are 'nice to have' and give you an accurate basis for setting a budget.

MAKE A DECISION 8

"This could range from doing nothing, staying where you are with no change other than a lick of paint, to a full fit-out."

It's decision time. You should now have enough information to make a decision about if, or how, you are going to progress. This could range from doing nothing, staying where you are with no change other than a lick of paint and perhaps some new chairs, to moving to a swanky new office with the latest environmental standards using BIM and Soft Landings.

You will also decide, if you have not already done so, whether to go down the traditional route or use a D&B contractor and whether to retain any elements outside the main contract.

APPOINT A CONSULTANT 9

If you have not already done so, you will need to appoint a consultant at this stage to take the project forward. Traditionally this will be an architect or designer or you may prefer to work with a D&B contractor. Whichever route you choose this will be a crucial appointment as they will lead the research, design and construction.
See TENDERING (page 31).

IN ADDITION TO YOUR BASIC CREDIT CHECKS AND DUE DILIGENCE, CONSIDER THESE QUESTIONS...

ARE THEY QUALIFIED?
Is there a recognised qualification for the role and do they have it? If there is not a single qualification, are the qualifications they do have relevant?

ARE THEY A MEMBER OF A PROFESSIONAL BODY OR TRADE ASSOCIATION?
Generally, you can verify this on the relevant website (also see APPENDIX I).

ARE THEY RESPECTED BY THEIR PEERS?
Do they sit on industry/expert boards or panels? Have they won recognised industry awards for past work?

CAN THEY HELP YOU GET ACCREDITED TO ANY STANDARDS YOU HAVE CHOSEN?
Have they achieved accreditation in the past?

IS THE ORGANISATION COMPETENT?
Competence is defined on their Skill, Knowldge, Experience & Behaviour (SKEB). Principal roles are described in standards from the 8670 series and should be demonstrated before you appoint them.

ARE THE INDIVIDUALS COMPETENT?
Individuals within an organisation should be asked to demonstrate their competence as described by SKEB, and are best aligned where companies use a competence management scheme.

HAVE THEY WORKED FOR CLIENTS LIKE YOU BEFORE?
Can you go and see their work at two or three different offices and talk to past clients – have they maintained good relationships with clients after the work has finished?

WILL YOU BE HAPPY WORKING CLOSELY WITH THIS PERSON/FIRM?
You are going to be seeing them a lot and depending on them to accurately understand, carry out and communicate your wishes. You will also have to rely on them being your critical friend. Don't choose the best candidate 'on paper' if you can't get along with them.

Good design is about making your office work for you, your staff and your customers. You cannot do that from a drawing board alone.

10.1 Do you need to survey staff first?

Researching staff behaviour and requirements helps inform the process. There will be an element of analysis to identify the proportion of different personality types and neurodiversity needs in each team. It will examine job roles and key work activities, considering the demographics and character traits of those involved. These are likely to be based on staff surveys, panels, interviews with individual team members and managers, plus some observations. There are free surveys from product providers and formal/informal processes run by consultants.

10.2 What can your staff contribute?

Staff are often your biggest asset and your biggest cost. Getting your new office right for your staff will be vital. The purchase of office space is traditionally a finance function – make sure you involve HR and FM at the highest level. You will need to consider how you will involve your workforce and how you will research their needs and desires. You will want to know what they like and dislike about the current office, so you can preserve or replicate the best bits and avoid the worst. Your staff may also have ideas that could improve the office environment – this is a chance to learn from them.

10.3 Are you introducing flexible ways of working?

Introducing flexible working arrangements with your teams provides you with the flexibility to re-allocate spaces within each department, as not everybody will require a permanent workstation. This released space can be used to provide defined spaces for collaboration, communication and concentrated work areas.

You might want to hire an external consultant to observe and measure the impact on staff.

10.4 Attracting and retaining the best staff

The impression given by an office can put off prospective employees. Poor performing workplaces push employees to leave. Work out what will attract and retain the best staff and incorporate that in your design. A good fit-out can cut recruitment costs and staff churn. Think not only about office and breakout space but about how people work: collaboratively, concentrated and communicatively, as well as wellbeing and practical steps such storage and filing, IT connectivity, servers, kitchens, toilets, bike storage and showers.

10.5 Do you need to boost productivity, reduce absenteeism and improve wellbeing?

With human resources often the biggest cost for businesses, getting wellbeing right can make a huge difference. The World Green Building Council has produced a report Health, Wellbeing and Productivity in Offices: The Next Chapter for Green Building, bringing together experience from its national members around the world. Wellbeing includes indoor air quality and ventilation, thermal comfort, daylight and lighting and biophilic design (applying a connection to nature). But it is also about planning how the building and people within it work best together, looking at the kinds of work they do, their motivation and the noise levels they make or can tolerate.

10.6 Do different groups of staff work differently and how do these groups interact?

A sales team, for example, might work in a loud, communal environment, calling across to each other, whooping and cheering at clinched sales deals or targets being hit. Others may need peace and quiet. Different groups of workers will also need different amounts of storage, have different sized computers and screens on their desk, and spend more time at their desk than in communal areas or meeting rooms. These factors will impact on space and noise calculations.

You must identify how your processes work and which groups, or teams, need to interact with each other or with other teams and how they do that. The results may be different to how you imagined it. Identifying what works well – and whether it could work better – could boost productivity in your new office.

You will also have to calculate if you need meeting rooms for external people as well as staff and, if so, how many and how large. And you must decide if you will need all these spaces simultaneously or even frequently – can three small rooms be converted into a large meeting room for the rare times it is needed?

What sort of communal area you require and what purpose they will serve is another major factor. Do you desire several choices of communal area for different purposes or different groups of staff? Do you need to give staff control over the noise level by closing doors or moving screens, the temperature and privacy they have?

10.7 Technology and the flexibility to adapt

Advances in the way we communicate on a regular basis have changed our need for a number of in-house meetings. For the technology to work efficiently, spaces should be provided to allow your teams to make video calls without disturbance from coworkers' discussions, and in a space that is not too reverberant so that discussion can be clearly heard and understood.

In the UK, internet users already spend most of their time online on tablets and mobiles, rather than desktop computers. Your office may need to reflect that. There may be other technological devices or applications that could help your business and that may mean new functions within your office. If video conferencing or face-to-face conversations are going to replace telephone calls, you will need to consider the office background, both visible and audible.

10.8 How your people work in the future – build in that change

There are three ways of working – collaborative, communicative and concentrated and each needs a different kind of office space. How do your staff currently work, how much time do they spend working in each way and how might that change in the future? Perhaps there will be more remote working, less time spent at desks, or shared desks. Many firms are working different hours today than they worked a few years ago and, post-Covid, this might continue to change. With worsening traffic and public transport congestion, the working day could be extended so that some staff start and finish earlier, while others take the later shift. Weekends may no longer be sacrosanct. This could impact on how your office will function and how it needs to be designed.

10.9 Launching new business lines, taking over a business or consolidating?

If you are embarking on something new, or you are bringing two sites or recently merged firms together, a great deal of research will need to go into how all your teams will best work, either side by side or integrated. If you have recently taken over a firm with different values and a radically different culture, or more complex or flexible ways of working, those differences must be addressed.

10.10 Considering a new brand?

If you are rebranding the company it will be important to ensure your fit-out reflects, endorses and promotes your brand values. You may also want to alter the company ethos as part of the rebranding or simply as part of an office move.

10.11 Introduce a new company culture or reinforce your core values?

Your office fit-out can either help or hinder this, so make sure you understand what is important to achieve, and communicate that at the earliest stage.

10.12 Coping with contraction and expansion

If you are expanding and growing your business, consider the biggest growth predictions you can imagine. You need to ensure that your fit-out will give you the flexibility to meet that expansion. Conversely, you might need to plan for a contraction in business, including a reduction in staff numbers, and need the ability to downsize and sub-let part of your office space. These factors can influence the choice of office and the design of your fit-out.

10.13 Do you need to carry out a space utilisation study (SUS)?

Do you know how much space you need for your people to perform their roles and tasks efficiently and effectively? You may need to carry out a space utilisation study, where you capture data on the usage of your workplace over a period of five to ten days to understand desk, meeting room, collaborative and break-out space usage. This will assist you with determining what you need in the future and also the latent potential within your people to work in a more mobile and agile way. There are rudimentary online calculators that might help give you a ballpark idea.

10.14 Have you considered a pre-occupancy evaluation?

There is often a gap between inexperienced clients and experienced contractors and designers. A pre-occupancy evaluation can help communicate the client's needs and desires. Within BIM there is a formal user pre-occupancy evaluation method (UPOEM). It aims to improve the communication efficiency and can involve building computer models so the client can better understand how their staff will fit in a proposed design.

PROJECT BRIEF 11

"This will build on your original strategic brief, including any tweaks or changes but also include significantly more detail."

A project brief adds even more detail to your plan and informs the design. Your consultant, who could be a designer, an architect, a quantity surveyor or a contractor will lead on this, having collected together the results of the research into staff, the building and the legal, regulatory and contractual restrictions. This will build on your original strategic brief, including any tweaks or changes but also include significantly more detail.

At this stage you will be clear on any environmental and wellbeing standards you wish to be met, your use of BIM, Soft Landings and any procurement requirements or restrictions. Changes from now on could prove costly.

The project brief is the document that is referred to going forward to ensure that all the delivery teams clearly understand what your priorities and expectations are, so it is important that:

- It is produced after wide consultation.
- It has been agreed by department heads, the internal project team and the board.

It will be used to fine tune your plan. It will inform the team writing the specification of the products that will be used and what you expect of them in terms of performance, cost, look and perception, environmental credentials, cost in use and maintenance requirements, guarantees and even what to do with the product at end of life. Importantly, it will describe your attitude to new products and ways of working, which could form the cornerstone of your fit-out or refurbishment.

Remember to call on the external teams around you who have lots of experience and will be able to help you get this important stage right.

The skill of design is to turn your detailed project brief into reality.

12.1 What benefits can good design bring?

Offices function best when staff have spaces in which they can collaborate, concentrate, communicate and be creative but can also find areas that respect their confidentiality. Design enables these things. Good design delivers happy, efficient and high performing staff with lower rates of absenteeism and better staff retention. It should also create a cost-effective construction process.

The sound insulation, reverberation in a space (echolike) and other acoustics, which could come from floors, walls, ceilings and furniture, fixtures and fittings all make a difference. Improving air quality and the use of natural light will play an important part. Even colour and texture of wall and floor coverings can improve an office space used for a specific purpose or by a specific group of workers.

Design is more than just about the best use of space and creating different psychoacoustic zones for different purposes. It involves psychoanalysis and creating a bespoke environment for your staff. And it does not stop at basic plans or visualisations but continues through the specification process and influences the selection of specialist subcontractors.

Don't point to an office you have visited or seen on TV or in a magazine and say you want your office to be just like that. What might have worked for a different company, with a different demographic and company ethos, won't necessarily work for you.

12.2 What will a designer need to know?

You cannot just email a designer and ask for a quote. A designer will visit your office and speak directly to managers and to staff. They will want to satisfy themselves that they have all the information outlined in the earlier section 'Identify why you need this fit-out'. They will profile your staff by their character type, work activities, need for private/communal space and the processes involved – partly by surveys and partly by observation. They will also want to know of any predicted changes to working practices. They will want to know your business plans and what you hope to get out of your fit-out. They will also need to know if the fit-out will take place in an unoccupied building or if it must be carried out in phases with your staff moving and working alongside the construction work. They will need to understand your brand and company culture and how you wish your office to be perceived by visitors. And they will need all the technical information about the building and your IT/AV needs. To this information they will add their knowledge from other firms similar to yours, similar buildings and the latest products and technologies available.

12.3 How do sustainability and wellbeing standards fit in?

Your designer is likely lead you on these issues to be clear on your views and to answer any questions you have. Your designer will build in sustainability and wellbeing into your office at all stages, including specification and construction.

12.4 How many design stages will there be?

This will depend on how complex your office requirements are and what contracting route you chose. A simple office fit-out with no planning issues and few major changes may move from a concept design straight to a detailed design from which the specification and construction can continue. A more complex office may require the concept design to be worked up in more detailed stages or require niche specialists to carry out particular aspects of it – structural engineers, acousticians, IT/AV experts, for example.

12.5 What is in a concept design?

The concept design should give you an idea of what you will be looking at. You will be presented with visuals but may also be able to view 3D visualisations and 'walk through' your future office. But at this stage nothing is certain. You may need to commission feasibility studies to be sure certain aspects can be carried out, or carried out at a reasonable cost. The concept design will start to outline possible costs, specifications and construction issues. It should help establish a timescale and milestones. It will also present an opportunity to consider procurement routes and financing opportunities.

12.6 What is in a detailed design?

The detailed design (sometimes called developed design) will be much more detailed, right down to the types of door furniture. There will be significantly more detailed specification. The process may well have involved choosing between samples, looking at mock-ups, visiting showrooms. In some cases, computer-generated models can be used so you can experience the light and noise changes as you move through your proposed office. The detailed design will also include the specification of covered elements such as the ductwork, piping, heating and lighting, if these are being modified. It may also include safety-related information, such as fire zones, and risk assessment information for the building and for the construction process.

DESIGN CHECKLIST

- **Address business needs – avoid form over function**
- **Be open minded – consider all the alternatives**
- **Use data to inform decisions**
- **Design must encompass sound, air quality, functional space**
- **Will it attract and retain the best staff?**

12.7 Furniture, fittings and equipment (FF&E)

When making direct purchases of furniture, fittings and equpiment that do not involve the principal contractor, consider if these can interfere with:

- The impact on sequencing and programme
- Trade co-ordination of elements that integrate with M&E services
- The ability of principal contractor to control labour and deliveries on site
- The control of finances under principal contractor or cost consultant
- Ensuring that UK regulations on compliance are met.

12.8 What are the consequences of making late changes?

You will be expected to physically sign the finalised design drawings to show you have approved them. Once signed, a late change to your design can be catastrophic. It may rule out an element of the design or cause a long delay. It may mean starting again. It will certainly add costs. What you may perceive as a small change to one corner of your office could hold up everything or require work already completed to be removed and done again. For example, a wall with fire resistance properties or specific sound insulation capacity cannot simply have a hole drilled through to put an extra electrical socket in a neighbouring room. The integrity of the wall would be compromised leading to remedial measures with associated costs and delays.

Don't be fooled into thinking this is the boring bit. Getting the specification right will make or break your fit-out.

13.1 A specification describes the materials and workmanship required for your fit-out.

It is normally broken down into the sections that are likely to be carried out by different expert subcontractors (see page 11).

It will often describe the performance required rather than name the products to be installed and the installation methodology. It needs to be flexible enough to allow expert subcontractors to suggest different ways of achieving the desired outcome and for the contractor to identify where different methods or timings can improve buildability. There may be elements where you will prescribe exactly what is required but there are likely to be a mix of prescriptive and performance-based elements. A too prescriptive specification is likely to reduce competition and will deny you the chance to use innovative or alternative products or building techniques.

A specification gets more detailed as the design process moves on – your contractors may be left to specify some elements as this may make the building process more efficient. However, it is vital that your specification enables the fit-out to be tested and measured against your stipulated requirements in the original specification to ensure compliance.

13.2 What is included in a specification?

A specification is likely to detail the entire process, beginning with stripping out the existing fit-out. It may include structural work, M&E, telecoms and IT (including Wi-Fi performance, connectivity), lighting, HVAC, window glass and blinds, electrics, partitions, floors and flooring, ceilings, furniture, fittings and equipment, toilets and kitchens, decoration, noticeboards and signage. It will detail the required performance of each element and the standard of workmanship required. Where appropriate, it will detail products, using National Building Specification clauses (NBS). It will identify any samples that were approved. It could include room data sheets (RDS), which give a detailed description of all the finishes, fixtures and fittings, as well as mechanical and electrical requirements for each room or space.

13.3 Is a BIM specification different?

If you are using BIM, then the information within the model can be used to produce specifications at all stages of the process. As the model is developed and detail added, the specification will become more detailed. One of the benefits of BIM is being able to check that the building met the specification in the original design. The NBS has a National BIM library for products involved in specifications, which is growing all the time, and manufacturers are adding structured digital data sheets to their websites.

WRITING A SMART SPECIFICATION

- Talk to the manufacturer
- Performance is king (fire, sound etc)
- Consider the interface with other elements
- Understand the use, now and for the future
- Understand the budget
- Understand the programme and site conditions
- Understand your vision and aspirations
- Ensure performance and workmanship requirements and standards are clearly included
- Understand maintenance implications
- Understand environmental implications
- Don't be afraid to specify something new
- For guidance on the questions to ask, refer to FIS published specifiers guides thefis.org/membership-hub/publications/specifiers-guides/

"Let your people choose the end products from a range that the project team are comfortable with as they will be happier with the result."


15.06

Now you must go to the market and find the firm you trust to transform your fit-out from paper and computer images into physical reality. In some cases, government (including EU or local council) procurement rules will apply. Individual company policies may also impose restrictions or tendering rules. Make sure you comply with any requirements imposed upon you.

14.1 How do you find suitable contractors?

Your letting agent can recommend fit-out firms that have worked in the building before or have worked on similar projects. Your architect or designer will recommend contractors they have worked with that have experience of similar fit-outs. Firms with offices you admire may provide details of their contractor. You may have met a contractor at a show, exhibition or other business events. You can speak to facilities managers about their experience of occupying buildings after fit-out. Trade body FIS, which represents the finishes and interiors sector, lists members who offer a fit-out or specialist service on its website. All members of FIS must meet strict criteria when they join and this process is repeated every three years. A current list of members is available, including a search filter for design and build contractors at **thefis.org/member-directory**

14.2 How do you select your shortlist?

You may wish to use a pre-qualification questionnaire (PQQ) to assess the competence of potential contractors. You may set minimum demands, such as membership of FIS and being registered with the Considerate Constructors Scheme (CCS). You will want to whittle down your long list to just a few firms you already feel comfortable about working with (bear in mind the general advice on selecting your team). Often people shortlist just three firms.

14.3 How will you assess tenders?

In addition to the written tender it is often useful to hold mid-tender interviews to seek clarification and gain additional insight into the contractor. You can assess based on the cheapest compliant tender, but this may not give your best outcome. An alternative is to consider other factors that you believe will make the tenders best value – sometimes called the most economically advantageous tender (MEAT). Non-price factors might include:

- Design quality.
- Relevant experience and past work.
- Levels of technical skills or qualifications.
- Financial stability and capacity to do the job (availability of capital and staff).
- The management – your confidence in them and your ability to work with them.
- Methodology proposed and the health and safety, environmental and quality systems they use (which together may form an integrated management system).

"The cheapest is not always the best. All too often bids come in cheap but then must be topped up later."

You should know and have met the person the contractor proposes will manage the site and have confidence in them. If you are using BIM, can your contractor demonstrate having worked on a BIM fit-out before, using subcontractors with relevant BIM experience? The cheapest is not always the best. All too often bids come in cheap but then must be topped up later.

14.4 Programme

A programme is a schedule of works laid out in overlapping order of activity or installation, showing when phases of work will start and finish.

The programme can be produced by your consultant or by the tendering (principal) contractor.

This programme should be reviewed with all sub-contractors to ensure that adequate lead times, handling of materials on site and installation times can be achieved.

Where materials such as desks are being purchased outside of the contract, this should be co-ordinated and agreed with the principal contractor before placing orders.

A well written contract will benefit all by:
- Showing written proof of what was agreed for all to see.
- Reducing the risk of future misunderstandings.
- Explaining dispute resolution.

15.1 What sort of contract will you negotiate?

You contractor will expect a standard Joint Contracts Tribunal (JCT) contract, which FIS recommend. On major construction projects, such as the London Stadium (Olympic park), a New Engineering Contract was used.

In addition, some landlords demand contractors enter into a collateral warranty, giving the contractor 12 years of liability. Others might insist on a contract giving 15 years of liabilities – still more than covered by some product guarantees. Indemnities also extend liabilities from when the breach occurred to when the breach is discovered. All these are unusual and unpopular and are often a barrier to contracts being signed. A knowledgeable contractor will raise the price in such cases or may refuse to bid.

15.2 What payments will you detail?

You might factor in a series of payments, including a mobilisation fee (15%) and a sum at the start of the works (25%), with further payments triggered by key milestones. You might make the final payment (20%) two weeks after taking occupancy.

Some clients demanded a retention, which is a withheld payment to force a contractor to return after occupancy to rectify any issues. However, this has historically been open to abuse, will be unpopular and may increase the price. Guarantees from the contractor will bring them back to fix any issues without the need to withhold payment.

Another controversial term is a liquidated and ascertained damages clause to oblige the contractor to pay a fixed weekly amount to cover additional costs you incur if they are late. Such clauses may put off contractors completely, or increase the price.

15.3 What reporting mechanism will you agree?

Be clear how often you expect updates and in what format (written, with photographs, by email, verbally, presentations, in your office, on site, by phone etc). Decide if – and when – you wish to visit the site while work is in progress (bear in mind that work may have to stop while you are there, so visit infrequently and only at agreed times). Anything more than weekly site meetings would be unusual. Agree how problems/solutions, complications, or alterations will be reported to you and approved, and how disputes will be resolved.

15.4 Who is covering the insurance of the various contracts and risks?

There is going to be a lot of form-filling and legal compliance before you even get started. You must be certain who is liable for what and who has the insurance responsibility. You will need to be clear who has the employer's liability, and what is and is not insured by your landlord and contractor. The landlord may cover the building structure but you need to cover the works and health and safety liabilities. Your chosen contactor is likely to have access to a specialist insurance broker who can source the correct insurance for you. You may also need a specialist law firm with construction experience.

15.5 Who will oversee compliance with regulations?

You will need to consider:
- The Building Safety Act 2022.
- If you will be in a 'higher risk building'.
- Building regulations.
- Construction (Design and Management) regulations (CDM).
- Other health and safety legislation.

As a minimum you will need to comply with building regulations and arrange for the building inspector to visit the site.

Health and safety considerations are also significant, especially if your fit-out is within a larger building with other tenants using it daily. While there are general health and safety obligations covering all works, there are also specific rules and procedures for specific tasks or for working with certain materials. You will need to make sure you are applying all the relevant codes and procedures including, but not exclusively, the HSE's Construction (Design and Management) regulations.

15.6 Building safety act and HRBs

If you are in a higher risk building (HRB) as defined by the Building Safety Act, then the roles defined in CDM regulations may have additional responsibilities that you need to consider.

The HSE has published useful guidance on the reponsibilities of a client under CDM regulations which can be found at **hse.gov.uk/pubns/indg411.pdf**

15.7 Notification of a construction project

You can inform the HSE of a notifiable construction project using online form F10.

You will need to know the contact details for the client, principal designer and principal contractor.

A construction project is notifiable if the construction work is expected to:
- Last longer than 30 working days and have more than 20 workers working at the same time at any point on the project – or
- If it will exceed 500 person days.

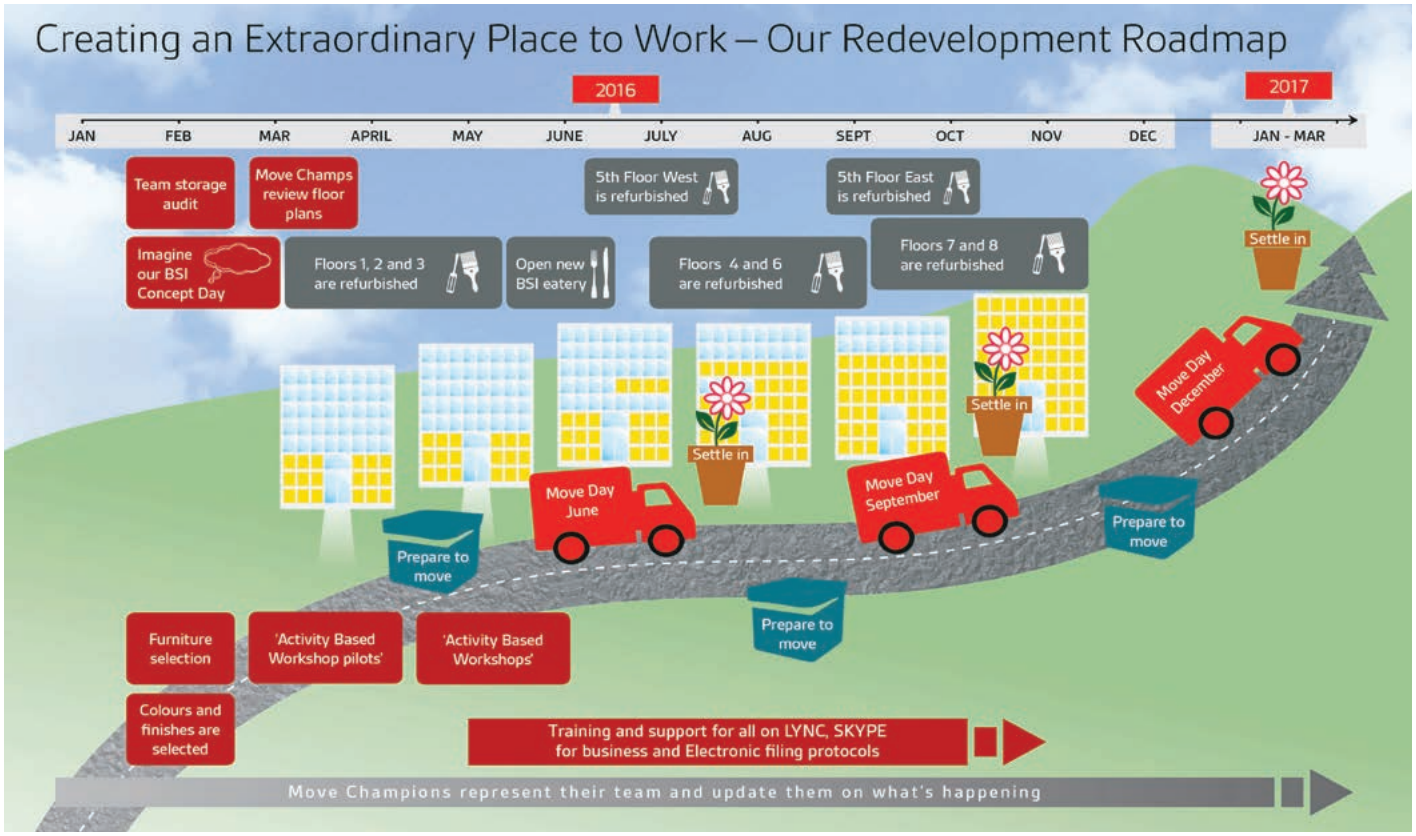


Image courtesy of BSI

This is where you hand over to the skilled trades and professional experts in the construction industry. They have a lot more to think about than just fitting out your office. Here are just a few examples:

16.1 Health and safety

Under the Construction (Design and Management) Regulations 2015 (CDM 2015) commercial clients retain responsibility to ensure the fit-out is suitably managed. When there is more than one contractor on site there must be a principal designer and a principal contractor. The principal designer controls the pre-construction design and planning stage, obtains and collates pre-construction information provided to the principal contractor, prepares a health and safety file and ensures compliance. There are also specific responsibilities for subcontractors and individual workers. Ensure all are aware of their responsibilities and have necessary procedures in place. Major projects longer than 30 days and have 20 or more working simultaneously or take more than 500 person days, for example, must be reported to the HSE.

There may be other specific health and safety legislation, such as working at height or control of substances hazardous to health (COSHH).

16.2 Enabling works

- Ensure licence for alteration from the landlord is in place.
- Assess restrictions in terms of access, work times and specific types of working such as noise, heat etc.
- Obtain any necessary written permits.
- Ensure required planning permission is in place and an approved building regulations inspector has been appointed.
- Ensure adequate power and water are available.
- Make any special arrangements. For example, smoke alarms will need to be turned off while works involving heat are carried out.
- Arrange for proper waste separation for disposal or recycling.

16.3 External

- Organise parking, or have local parking bays suspended if necessary.
- Seek permission for skips and arrange access for delivery or specialist vehicles.
- Erect temporary hoardings and signage as required.

16.4 Internal

- Establish a site office and amenities (toilets, washrooms, break facilities) and arrange for these to be kept clean.
- Organise security to restrict site access to authorised personnel, issuing photo ID if necessary.
- Establish secure storage for equipment, chemicals, materials etc to avoid theft or contamination.
- Erect partitions to prevent ingress into site and to stop dust, dirt etc from contaminating other parts of the building, especially if they remain in use.
- Establish procedures for cleaning up quickly if any egress occurs.

OCCUPANCY (HANDOVER) 17

17.1 How should you prepare for occupancy?

IT'S TIME TO MOVE IN...

PLAN AHEAD
Pick dates causing least disruption. Coordinate holidays so key people are available. Consider a phased move in groups.

APPOINT A RELOCATION SPECIALIST
For risk management; vendor supply management; fit-out team liaison; staff liaison; and procurement of a separate move contractor if required.

APPOINT A MOVE CHAMPION
An organiser who can also troubleshoot if problems arise. Consider appointing deputies from each company team.

INFORM CLIENTS
Decide in advance what to tell your clients and how this message will be delivered. Make sure all staff stay on-message.

KEEP STAFF INFORMED
Issue regular updates via newsletters, intranet and social media. Use photos from your contractor to show progress. Provide welcome packs and training on the new space. Set up a help desk and floorwalkers to enable a speedier return to 'business as usual'.

NEW ADDRESS?
Ensure mail is redirected and all bodies you deal with are informed. Check all utility companies are told and bills paid up-to-date.

DE-CLUTTER
Urge staff to use this chance to dispose of anything useless. Put plenty of waste collection points in place. Recycle or donate before discarding!

DOCUMENT DISPOSAL
Consider destroying old documentation. Does anything need to be kept due to legislative or regulatory requirements? 'Certificated' shredding may be needed to maintain privacy.

REMOVALS
Fix details with your removal or move management company. Order crates and labels for packing up.

SECURITY
Ensure the site you are vacating is left secure, as well as considering the locks and alarms at the new premises.

SERVICES AND EQUIPMENT
IT, AV and M&E systems should all be fully commissioned and working before handover. Check FM contracts and any maintenance or usage arrangements are in place. Ensure staff are trained to use any new equipment.

17.2 What should you expect at handover?

Contractors aim to handover on time, on budget and snag free. 'Snagging' means checking for minor faults that need to be rectified. You must verify that the products and workmanship has been to the standards you specified. Snagging is not an opportunity to express dissatisfaction with the standards you specified or belatedly to try to change those standards. You can expect the site manager to be available in the early days and possibly weeks to fix issues (snagging).

You should expect to receive a completion certificate from building control along with all the necessary documentation and manuals for all your equipment (kitchen white goods, AV, security and fire alarms, electronic doors and windows, HVAC etc) and a welcome pack including any other information you need. This might also be made available electronically. The best will have provided training for your staff in the operation of all new equipment before handover (Soft Landings).

You will also receive an operation and maintenance manual (O&M) – also called a building owner's manual – with details of the fit-out's main elements, an asset register and any care and maintenance requirements. Any guarantees for products used in the fit-out will be included. There should also be details of how to remove and dispose of all the fit-out's elements to return the building to its original state.

If you have used digitalisation to capture information about your project, this will be your golden thread' of information which you will need to keep up-to-date.

17.3 Is there anything else?

Have a celebration. It will have been tough for everyone involved. Make the new office welcoming by letting the champagne corks pop.

Use this time wisely. Learn lessons for your next fit-out.

18.1 How long will your contractor be around?

Your fit-out does not end once you move in. Even if you have not specified a soft landing, your contractor will be on hand, or at the end of a phone to quickly fix or amend flaws and imperfections. Most will return within the next few months if something comes to light. If you have specified a retention in your contract, you will need to satisfy yourself that everything you needed resolving has been resolved to trigger the payment of the retention. The Soft Landings system would expect the contractor to be on hand for four to six weeks and available for at least a year, and possibly up to three years.

18.2 How do you evaluate the fit-out?

Post occupancy evaluations are commonly used and required under Soft Landings and BIM. The British Council for Offices (BCO) has a post occupancy evaluation guide. They may be carried out by a consultant or an in-house team, possibly led by facilities management. They not only measure performance against design but identify further improvements (alterations) that may be made, as well as lessons that could be learned for future fit-outs. They may be carried out several times over a long period. You may also have your own staff surveys and feedback mechanisms to measure success.

18.3 What else do you need to consider?

A new office may require new maintenance contracts to be put in place, new cleaning contracts and so on. New carpets create a lot of fluff in the first few weeks and dust will continue to settle, so you may need additional cleaning early on. A new office presents an opportunity to rethink your facilities management. You might consider outsourcing or upgrading your FM to focus on staff wellbeing.

You should also be aware of any dilapidations you may be liable for at the end of the lease as a result of the fit-out and any remedies you can implement.

"The Soft Landings system would expect the contractor to be on hand for four to six weeks and available for at least a year, and possibly up to three years."


Cabe
LUTYENS HOUSE

CASE STUDY

Client: CABE (Chartered Association of Building Engineers)

Contractor: Steele & Bray
Architect: Stagg Architects

Structural engineer: DSA

Identify need
After over 40 years in their original purpose-built HQ without major modernisation, CABE decided to fully refurbish their premises whilst retaining the building as a whole in order to better reflect the reputation of this otherwise modernised and prestigious chartered association.

Project brief
The main practical concerns in the brief were to significantly improve the thermal performance of the building, to ensure full compliance with Document M and to facilitate future integration of renewable technologies in line with carbon neutral targets, all whilst working to ensure existing materials such as ceilings, doors and woodwork were re-used to the fullest extent possible in line with CABE's current commitment to sustainability.

Research
Significant technical analysis of the existing building was undertaken, including software analysis of heat losses and gains testing various solutions to assess the impact they would have in terms of energy use and carbon reduction. Analysis showed that the biggest improvement to energy efficiency would be made by a combination of replacing all the windows and providing better insulation at ceiling level which allowed for authorship of a more precise brief.

Procurement
Outside of the savings considered by the re-use aims, as a not-for-profit organisation deriving income from membership fees and training courses, CABE had to spend resources openly and transparently in a manner that is consistent with their own code of conduct.

Making appointments
Several architects and contractors were invited to an interview at the existing HQ. These visits proved to be beneficial for all parties allowing not just for clarifications, but helping visualise the project and discover more about our drivers before tendering for a shortlist which identified those that met the brief in the most appropriate way. Information about other relevant projects that they had worked on, competency, sustainability and financial stability, as well as the project budget and timeline were all considered. CABE then held final interviews and presentations with the senior executive team before making the final appointments.

Delivery
The project was delivered just one week late on a 22-week programme, which is pretty good, considering it ran over winter and during a national lockdown as a result of the Coronavirus pandemic. In addition, the site remained Covid-19-free throughout. CABE worked closely with the main contractor to ensure health and safety was prioritised, resulting in no reported accidents during the works. The original contract sum increased by just 2.6%, well below a typical 5% to 10% contingency for works to an existing building, and the project was completed to a very high quality.

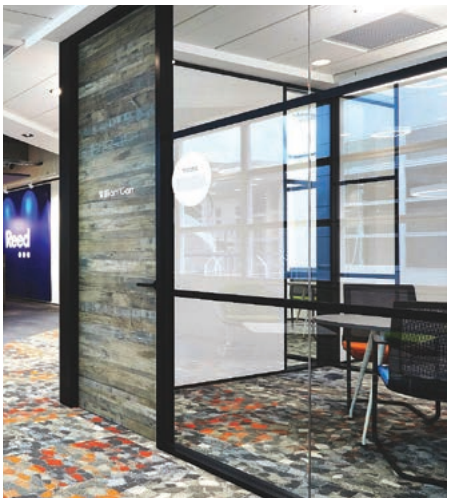
The refurbishment is a great example of how the cost-quality-time paradox can be defied while still pursuing a highly sustainable agenda, and says much about CABE's values and aims in relation to the wider construction industry and the challenges it faces.


Reed
Reed

CASE STUDY

Client: Reed Specialist Recruitments

Consultancy and design: Peter Grant Associates



Core architect: JV Architecture
Fit-out contractor: Intex Projects

Project Brief

The client's brief for their own space on first floor was to create an open dynamic agile workspace for a number of central service teams to the business plus specialist recruitment teams and space for key global directors.

Research

The accommodation has 270 fixed work positions but based on an occupancy level of circa 80% and a selection of other agile workspaces the space could accommodate over 400 persons working out of the building, giving an occupancy level of 6m² per person.

The client and designer spent an intense period of time with occupier groups to establish the detailed brief, working strategies together the facilities and spaces that suited how they wished to occupy their building.

The fit-out

The floor is split down the centre with core facilities and two atriums allowing plenty of extra natural light into the floor, either side of the central core we have designed two 100-metre-long streets with galley kitchens and street café seating that have exposed services.

The main meet and greet zones are designed within the conference facilities which contains various size flexible rooms together with back of house rooms. The space around the working areas and the six person benches is generous with plenty of space of expansion in the future.

There are drop-in quiet work rooms, meeting and workshop pods spread throughout the workspace which also break up the workspace into neighbourhoods. There are two large social spaces at each end of the building core together with a large touch down space and a quiet seating zone.

The use of ceiling bulkheads, ceiling rafts, lighting and floor finishes define the spaces, walkways and pods. In the main workspace direct and indirect linear lighting was specified.

There is a repeated pallet of vibrant colours in carpet and fabrics used throughout the project contributing to a selection of vibrant colours within a neutral background of subtle greys.

The use of products and surfaces from sustainable sources was paramount during the specification stage, eg the use of recycled coffee cups in the specified solid surfaces.

Delivery

The working practices have changed since work commenced on the project. However, from the start it was always envisaged the space could be adapted and changed to suit the business needs.

Attention to detail and properly structured development of the design on site enabled a high-quality fit-out to be completed on budget and in programme.

APPENDIX I – SPECIALISTS

Your fit-out might not need all of the specialisms presented here but most fit-outs will need several of these skills and each might be provided by a separate subcontractor. For that reason, fit-outs are usually project managed by someone with years of experience. They take the hassle away from you because they put together the right team at the right time.

Acoustician
There are no restrictions on the use of the job title acoustician. The professional body is the Institute of Acoustics (IOA). It has three designations: those beginning their career (AMIOA), members (MIOA) and fellows (FIOA). The IOA offers a directory of those members who wish to promote themselves via its website and will also confirm membership by telephone. There is also a trade association for consultants (as opposed to acousticians in academia and non-construction fields). It is the Association of Noise Consultants (ANC) and it offers help finding a consultant.

Architect
All architects are listed with the Architects Registration Board (ARB), set up in 1997 to regulate the industry. It decides which courses produce qualifications for architects and has an examination for those with qualifications not recognised. Only registered individuals and firms can call themselves architects. You can verify an architect is genuine using the 'find an architect' function on the ARB website. About 75% of all registered individuals are also members of the professional body the Royal Institute of British Architects (RIBA), also promoting best practice. Members have the designation RIBA after their name. Firms can also register as chartered, agreeing to comply with additional criteria concerning environmental standards, health and safety and a host of other commitments. These firms can be verified via the RIBA website.

AV consultant
There are no restrictions or special qualifications for an AV consultant. Knowledge of the latest and imminent technologies, such as virtual reality and augmented reality, can help ensure your office is future-proofed. An AV consultant may be particularly useful if you need to be able to present to or address large groups, run conferences, or have an auditorium, for example.

Building services engineer
There are no restrictions on using the title building services engineer and there are many specialisms within the profession, including fire and security systems, lifts and escalators, lighting and ventilation and those specialising in low carbon buildings. The Chartered Institution of Building Services Engineers (CIBSE) is the professional body and has seven levels of membership. It offers a service to help find specialists.

Building surveyor
Building surveyors offer professional advice on factors affecting existing buildings such as building defects, alterations, renovations and extensions, as well as on the design and construction of new buildings.

Clerk of works/compliance officer
There are no restrictions on the use of the job title clerk of works. It is a position usually gained through experience of sites. The Institute of Clerk of Works and Construction Inspectorate (ICWCI) has three membership categories based on experience (in addition to student members). The level is decided by a panel of existing members based on an interview when applying to join. These are identified with designation LICWCI for those early in their career, MICWCI for members and FICWCI for those with ten years or more of membership. The ICWCI will verify members and, in addition to a 'find a clerk of works' function, it includes adverts on its website and in its journals for those seeking a clerk of works.

Design and build (D&B) contractor
Some contractors will offer a design and build service in addition to operating as a standard contractor. A D&B contractor will run the entire fit-out for you. They have all the skills needed for most standard fit-outs, either in-house or through regular subcontractors. They will plan the space you need, design your fit-out, deal with all the regulatory, legal and contract issues, carry out the construction work, even buy your furniture and help you move in. And it's not just small office moves that can be operated through a D&B contractor. Major D&B firms can manage large office fit-outs. D&B contractors claim to be able to deliver fit-outs faster and cheaper.

APPENDIX I – SPECIALISTS

Designer
There are no restrictions on the use of the job title designer. There are many courses and qualifications in design, varying in length, content and quality. In 2009 the British Institute of Interior Design (BIID) was granted 'institute status' by the UK government and in 2016 it launched a Registered Interior Designer designation, which was welcomed by RIBA. There is also a Chartered Society of Designers, which since 2011 has awarded the Chartered Designer status. Its membership includes building and interior designers but also all other fields of design. The Society of British and International Design (SBID) is a professional body registered in the UK to accredit professionals in interior design. Many highly respected and experienced fit-out designers are neither registered nor chartered.

Environmental consultant
Environmental consultant is a broad term covering a wide range of possible roles. With buildings being significant contributors to greenhouse gases and carbon usage, the issues environmental consultants may address have become increasingly important. There are people qualified or registered to apply environmental standards (BREEAM, LEED, SKA, WELL), low carbon engineering experts, people with skills and knowledge in recycling, reuse, green energy sources, reduced water usage etc. Many professionals, such as architects, designers, surveyors and building services engineers will have these environmental skills but in addition there are the Chartered Institute of Ecology and Environmental Management (which received its Royal Charter in 2013) and the Institute of Environmental Management and Assessment (IEMA).

Fire consultant
Specialists in passive fire protection, including using fire resistant materials and design to contain fires in small areas, reduce building collapses and maintaining means of escape. There is an Association for Specialist Fire Protection (ASFP) and an umbrella body for the sector called the Fire Sector Federation (FSF).

IT consultant
Many different niche skills are covered by this catch-all title, with experts in different technologies, operating systems and platforms. The key is to find someone with experience of the sorts of IT you use, or need to use. The main UK body is the British Computer Society (BCS), which offers registered technician (RITTech) and Chartered IT Professional (CITP) qualifications.

Lawyer
All solicitors are regulated by the Solicitors Regulation Authority, with most being members of the Law Society. A small number specialise in construction law, including contracts and arbitration. Many work direct for clients and contractors within the construction sector. Most independent construction lawyers are within a smaller number of about 50 specialist firms.

Main contractor
Main contractors are construction firms with experience in managing building projects, including fit-out. The key is they will hire all the necessary subcontractors needed to complete the work.

Niche specialist
Niche specialists to carry out particular aspects (structural engineers, acousticians, IT/AV experts, etc.)

Principal contractor
Appointed by the client to control the construction phase of any project involving more than one contractor.

Project manager
There are no restrictions on the use of the job title project manager. In construction, the relevant professional body is the Chartered Institute of Building (CIOB). It accredits courses and training and provides chartered status, originally Chartered Builder, but more recently Chartered Construction Manager. Designations are MCIOB for members and FCIOB for fellows.

Quantity surveyor
Quantity surveyors have analytical skills and are involved in the financial management of construction projects. Your main contractors will probably employ one but you may also hire a private QS to help you cost your project and keep an eye on the costs claimed during construction. The professional and regulatory body is the Royal Institution of Chartered Surveyors (RICS). Members' designation is MRICS and fellows take FRICS. You can check membership online.

Space planner
Many D&B contractors and furniture suppliers use space planners, rather than designers, to calculate the best layouts and different types of workspaces within an office. There are no fixed qualifications, though many may have come from a design or architecture background.

APPENDIX I – SPECIALISTS

Special engineering contractors
The Specialist Engineering Contractors' (SEC) Group is an umbrella grouping of trade bodies covering steelworks, heating and ventilation, electrical, plumbing and lifts. However, there are many other niche experts who may be involved in your fit-out as subcontractors.

Subcontractor
In addition to potential niche specialists in fields as diverse as asbestos inspection and removal, structural engineering, fibrous plastering (for historic buildings), audio-visual/IT consultants and security systems providers, you may have several subcontractors on site. These could have such specialisms as:

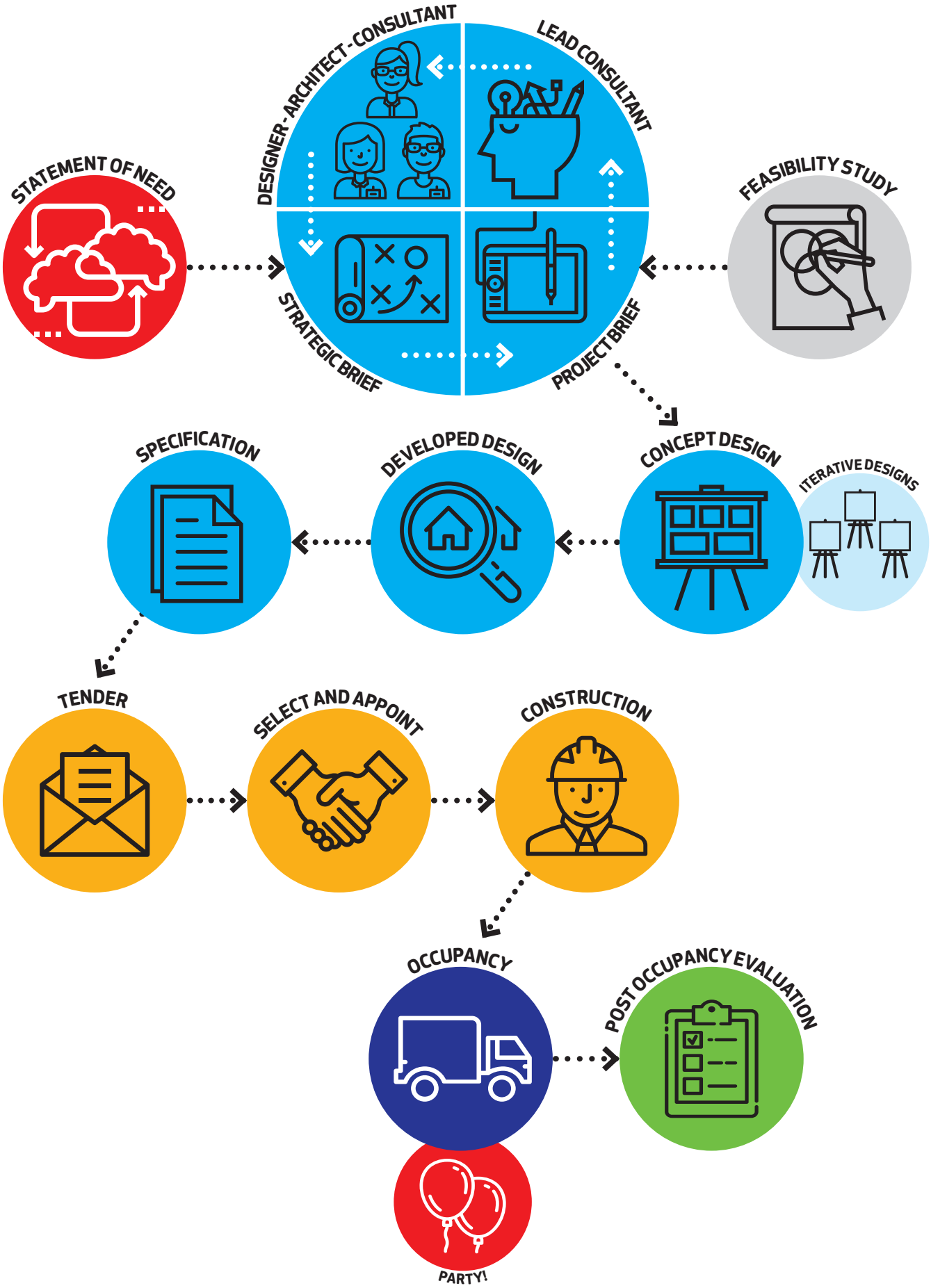
- Cabling
- Decorating
- Doors
- Drylining/drywalling
- Flooring
- Furniture fittings and equipment (FF&E)
- Health and safety
- Heating, ventilation and air-conditioning (HVAC)
- Joinery
- Kitchens – industrial
- Kitchens for breakout areas
- Lighting
- Mechanical and electrical engineering (M&E)
- Mezzanine floors
- Moving services / relocation specialist
- Operable walls
- Partitions
- Plastering
- Raised access floors
- Rendering
- Screed
- Secondary glazing
- Steel framed systems
- Storage systems
- Storage walls
- Structural glazing and balustrading
- Suspended ceilings
- Telecoms
- Tiling – walls and floors
- Window film and blinds

Structural engineer
The UK's leading body is the Institution of Structural Engineers (IStructE). It has six levels of membership and four designations covering technicians, associations, members and fellow. IStructE offers a find a structural engineer service.

Workplace consultant
Workplace change professionals support decision-making in workplace strategy, design and management.

Change management is the process for managing the people side of any change. There is a UK body for in-house professionals and external consultants called the Workplace Change Organisation.

APPENDIX II – PROCESS MAP



WHAT IS FIS?

FINISHES & INTERIORS SECTOR

FIS has grown over the past 50 years to become the leading trade association for the finishes and interiors sector of the construction industry. Representing companies involved in the manufacture, supply and installation of all aspects of finishes, interior fit-outs and refurbishment, we work on behalf of our membership to raise awareness and increase the influence of the sector. We help members to make the most of opportunities through advice, training, technical support and dialogue with government and other bodies.

Quality and integrity lie at the heart of FIS's philosophy, our focus is on developing sector skills, driving technical competence and building our community. Each member is expected to act with the utmost integrity, and to exercise the highest standards of business practice and workmanship. At the same time, the Association seeks to continually raise, maintain and ensure the perpetuation of standards in order to remain a source of quality membership.

FIS membership is not automatic and applicants are subject to strict vetting procedures on application, as well as ongoing vetting. In the case of contractors, this includes inspection of recent contracts to assess workmanship standards.

thefis.org

FIS has a membership approaching 600 contractors, manufacturers and distributors specialising in finishing operations including ceilings, SFS, partitions, plastering, drylining, joinery, and complete interior fit-out and refurbishment.

Our members help transform structures into homes, schools, hospitals, care homes, workplaces, hotels, leisure facilities, retail outlets and functional spaces.

Their work delivers critical fire protection, compartmentation, acoustic and thermal comfort as well as the aesthetic finish of the building works.

Their membership gives them access a comprehensive range of support centred on compliance, competence, technical standards and troubleshooting.

Examples of FIS members' work can be found in our project library at **thefis.org/project-library/**

SPECIFY WITH CONFIDENCE

"FIS is a powerful force for change, not just for headline technical guidance (which is excellent), but the team are widely acknowledged to be driven, knowledgeable, keen to make a difference and, most importantly, they get stuff done."

Martin Adie, Head of Quality, Balfour Beatty

Why specify an FIS accredited contractor?

Membership is subject to strict vetting procedures built around the FIS PPP Quality Framework.

Membership of FIS is not automatic. Accredited members are vetted on application, and then every three years to ensure that they continue to meet the high standards that FIS demands.

Ongoing vetting for contractors includes on-site assessment and as well as a range of financial and legal compliance checks.

The physical vetting process is supported by an annual declaration, our disputes resolution process and code of conduct with sanctions possible in line with the FIS rules of membership.

Find a vetted FIS member by visiting **thefis.org/members-directory-landing-page/**

"The team at FIS are fantastic and passionate about driving improvements within the industry. The closer you work with them, the better your business will be."

Kevin Dundas, MMC and Offsite Manager, Willmott Dixon

Specify with confidence

FIS provides specifiers with a single source of fit-out and finishes specialists. Our best practice advice and ongoing vetting of members means you can specify based on FIS advice and membership with confidence.

Reduce risk with FIS guidance

FIS produces a range of best practice information (where appropriate accredited by RIBA) that is cited within leading specification platforms such as NBS. We encourage specifiers to reference this against the specific trade package. Key resources available include:

- FIS Site Guides focus on health and safety, storage, handling and sequencing with other trades, as well as fixing.
- FIS Best Practice Guides are essential guides to selection, planning and compliant installations in key specialist areas.
- FIS Specifiers' Guides have been developed by industry to provide information on performance attributes required against regulation and client requirements to develop a compliant, and complete specification.

FIS Technical Team

If you cannot find the guidance you need within our best practice information, our technical team is on hand to assist. To see what additional support is available, email them at **info@thefis.org**

NOTES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FINISHES & INTERIORS SECTOR

CLIENT GUIDE
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