TENANT COORDINATION
“Management process related to the design and preparation of a new retail unit, in order to trade in a new or existing retail premises.”

Also referred to as “Retail Delivery” or “Tenant Installation”
Course Structure

• Part I.
  – Developer’s and Tenant’s Perspective
  – Components of lease
• Part II.
  – Attributes of Tenant Coordinator
• Part III.
  – Lease coordination
• Part IV
  – Processes
Part I.
Developers Perspective

• Objectives
  – Maintain positive relationship with tenant
  – Inspire, Inform and advise
  – Absolute clarity to avoid disputes
  – Achieve design quality
  – Minimise disruption (existing centres)
Tenant Coordination Project Structure

- **Client**
  - Centre Management
    - Managing Agents
  - Tenant coordination Manager
    - Architect
      - Services Consultants
      - Cost Consultants
      - CDM CoOrdinator
      - Sustainability
    - Retailer
      - Retailer’s main contractor
  - Legal
  - Leasing Team
    - Letting Agents
Tenants Perspective

- Maintain brand image
- Clear communication
- Obtain certainty (Specification and time)
- On site control
Tenants objectives

- Sales
- Maximise income
- Minimise cost
Components of Lease

a. Legal agreement
b. Lease plans
c. Tenant specification document
d. Tenant design criteria (if available)
e. Site Constraints (if available)
a. Legal agreement

• Terms of lease, covering all non technical issues.
  – Rent
  – Termination provisions
  – Renewals
  – Contributions
  Etc
b. Drawings
Land Registry compliant plan (LRP)
Letting Plan showing areas and critical dimensions
Unit Location Plan
c. Tenant specification document

- Description of unit
- What Landlord will provide
- Milestones
- Technical specifications
Description of unit

- Typically shows on dimensioned drawings, plans, sections, elevations, and position within centre
- Shows obstructions outside of unit
Landlords provision

- Describes typical provisions, such as:
  - As is
  - Vanilla Box
  - Turnkey or built to suit
  - Improvements by Tenant
  - Variable as per agreement
Milestones

• Delivery of Shell, Ready for Fit out.
• Access dates for Merchandising and staff training
• Black out dates
• Trading dates
• Centre opening (If applicable)
Construction and fit out programmes

- Ensure construction contract is co-ordinated with lease obligations
- Ensure there is sufficient float in main construction contract to absorb delays
- Establish processes to continually monitor impact of main construction variations on lease.
<table>
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<tr>
<th>Line</th>
<th>Name</th>
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**Strategic Programme**

- Summary Bar
- Site Works by JLP
- Pre-start Liaison Meeting / Hanover Meeting
- Contract Works - On Site
- Key Date
- Contract Works - Scope Type 6
- Contract Works - Scope Type 5

**Comment:** Indicative Only at Stage 1 Tender

**Author:** david.fam@cyrlisweet.com

**Programme No:** 19856/DF/A&TVC/IBP1 Rev 00

**Revision 004 Issue Date:** 25/09/2008
Typical durations

• Allowance to be made in programme for tenant installation.
  – HOT to Lease  + / - 16 weeks
  – Design Process 4 to 16 weeks
  – Fit out periods
    • Small unit  4 to 6 weeks
    • Medium unit 12 to 16 weeks
    • Anchors 1 year
    • Restaurant
      – 8 week construct, 2 week commission, 2 week trails
Technical Specifications

• These describe the landlords obligation in what will be delivered to the tenant.
• It will describe variations to standard specification
• It is critically important to ensure this is co-ordinated with main construction agreement
Unit Provision
Incoming services

- Electrical
- Water Supply
- Drainage (+ grease trap systems)
- Air Extract (Kitchens)
- Gas supply
- Heating Ventilation and Cooling (HVAC)
- Sprinklers
- Shop alert / security
Unit Provision
Internal Constraints

- Wall, floor and ceiling loadings
- Openings (Lifts and escalators)
- Other tenant services passing through unit
- Landlord services passing through unit
- Acoustic provisions
- Fire Requirements
Unit Provision
External constraints

- Kiosks outside unit
- Sightlines
- Benches and planting
- Signage
- Wireless network limitations
- Neighbours
• Turnover monitoring
• Fire exits & means of Escape
• Disabled Access
• Service routes
• Waste strategy
• Communal areas
• Tenant plant areas
Example of load distribution

### SUB STATION
- **Capability:** 1000 kVA
- **Current Load:** 792 kVA
- **Spare Capacity:** 208 kVA

**Provides supply via six main cables into Shopping Centre:**

<table>
<thead>
<tr>
<th>DISTRIBUTION BOARD 17:</th>
<th>DISTRIBUTION BOARD 13:</th>
<th>DISTRIBUTION BOARD 12:</th>
<th>DEDICATED SERVICE:</th>
<th>DEDICATED SERVICE:</th>
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<th>Interconnector to No.4 substation</th>
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<td>Currys Digital*</td>
<td>Hugo Boss*</td>
<td>2x cash machines</td>
<td>Mothercare</td>
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<tr>
<td>Game*</td>
<td>Ex JJB Sports*</td>
<td>Tommy Hilfiger*</td>
<td>Love Juice**</td>
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<td>Pravnis*</td>
<td>Claris*</td>
<td>Rigby Peeler*</td>
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<td>Baby Gap*</td>
<td>Ceci Gae*</td>
<td>Ernest Jones*</td>
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<td>Toni &amp; Guy*</td>
<td>Frazer Hatt*</td>
<td>Fatface*</td>
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<tr>
<td>Unit Z3</td>
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<td></td>
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<td><strong>CURRENT LOAD</strong></td>
<td><strong>CURRENT LOAD</strong></td>
<td><strong>CURRENT LOAD</strong></td>
<td><strong>AGREED CAPACITY</strong></td>
<td><strong>CURRENT LOAD</strong></td>
<td><strong>AGREED CAPACITY</strong></td>
<td><strong>CURRENT LOAD</strong></td>
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<tr>
<td>50 kVA</td>
<td>240 kVA</td>
<td>142 kVA</td>
<td>80 kVA</td>
<td>200 kVA</td>
<td>80 kVA</td>
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</table>
d. Tenant Design Criteria

- Opportunity to inspire, and control design quality.
- Describes the centre, and how the unit fits into the retail mix
- Provides design guidance to allow theming of different zones
- Places opportunities and restrictions to allow tenant to contribute to the centre’s design and leasing objectives.
- Provides mechanism to control and approve proposed design
Typical issues of Design Criteria

- Mission Statement
- Sustainability objectives
- Approach to tenant coordination
- About the centre
- Description of themed zones
- Project contacts
- Design approval process
- Operational Policies
  - Customer service
  - Environment
  - Access for all
Inspire

European Retail Property School

Food Terrace

Upper Level:
Upper Focal Space
Above Bar Mall

Lower Level:
Lower Focal Space Portland
Terrace Mall
Design Criteria

- Strong Brand identity with high level signage
- Use feature elements to define extend of external seating
- High Quality furniture
• Elaborates on landlords provision
• Describes in detail process of design approval process
• Describes what is expected of tenant
Inform - Typical Unit details

Typical section through The Focal Space

Typical narrow pilaster at tenancy division
e. Site Constraints

- Operational and process document
- Often prepared by main contractor in conjunction with tenant co-ordinator
- Describes how the tenant may conduct the construction element of their fitout
- Essential to ensure Main Contract considers tenant fitout process
Site Constraints document
typical contents

- Executive Summary
- Introduction
- Personnel
- Access and Security
- Deliveries
- Material Storage
- Health and Safety
- Hours of Work
- Life and Building Safety
- Protection and Hoardings
- Permanent Services
- Waste removal
- Communication
- Permit to Work
- Environmental Constraints
- Site Accommodation
- Commissioning

- Appendices
  - Indicative Shopping Centre Layout
  - Fire Alarm Interface Diagram
  - Guide to Commissioning
  - Fire and Smoke control Strategy
  - Guide to Fire Risk Assessment
Part II
The Tenant Coordinator

• Act as landlords representative.

• Skills in
  – Planning and organising
  – Design
  – Engineering
  – Construction (Programming, estimating)
  – Local authority bylaws
  – Leasing matters
  – Centre Operations
  – Retail knowledge
  – People Skills
The tenant co-ordinator will require specialist technical support.

Separate teams often set up to specifically manage tenant issues

Input required from:
- Architects
- Structural engineers
- Services engineers
- Fire specialists
Typical Duties

- An enquiry for the retail delivery process to be engaged can come from three sources: directly from the leasing and asset teams; the shopping centre’s management team or directly from the retailer.

- Distribute all associated retail delivery guides
- send introduction email to retailer and their design team with a brief explanation of the following:
  - Centre design guide
  - site constraints
  - commissioning guide
- submission forms R1 to R4
- this will then be followed up with a phone call to establish that a contact has been made and that the information provided and the timescales that are being worked to are understood by both parties

- Manage design briefings
- An additional service can be provided here when appropriate to do so. This will entail a review of the initial concept review with the retailer and their designer to establish the ground rules to an affective, inspirational and acceptable design.
- The process of which will be as follows:
- arrange briefing meeting with the retailer and their designer
- chair the meeting with the retailer and their design team
- outline and explain the design criteria and aspirations
- provide answers to any queries the retailer may have
- set out and agree timescales for the approval process
- advise the retailer of the likely fee levels
- produce briefing meeting minutes and circulate
Typical Duties

- **Manage concept approvals; (Stage R1)**
  - receive and collate the retailer's concept design proposal
  - encourage the use of the local Building Control Officer
  - chase any outstanding information to support the retailer and ensure that timescales are achieved
  - inform landlord of the extent of the retailers proposal and agree the involvement of the wider retail delivery team, which may include a structural engineer
  - once all required information is received, distribute to the wider retail delivery team for comment
  - collate retail delivery team comments within agreed timescales
  - issue comments back to retailer
- repeat until plans are approved while being mindful of the agreed timescale
- issue plans and comments to centre management once A or B status is achieved
- inform leasing team of retail delivery approval fee level
- confirm the level of fee that the client has agreed with the retailer
- finalise the agreed fee level with managing agents
- upon the satisfactory receipt of the R1 form from the retailer, issue the completed L1 form
Typical Duties

- Manage design approvals; (Stage R2 and R3)
- receive and collate the retailer's detailed design proposals
- ensure all necessary information is received and chase any outstanding information, while being mindful of the agreed timescale
- distribute proposals to the wider retail delivery team for comment
- issue retail delivery team's comments to the retailer
- repeat until plan are approved, while being mindful of the agreed timescale
- issue plans and comments to centre management once A or B status is achieved
- instruct managing agents to issue billing letter to the retailer
- chase payment and get confirmation from managing agents when paid
- request health and safety information and Insurance documentation and forward to centre management team and arrange pre-start meeting between the retailer and the centre
- receive information and data from the centre team to co-ordinate and issue handover certification of the unit, when applicable (H1 and H2 forms)
- issue insurance documentation and sprinkler details to landlord's insurer for approval
- upon the satisfactory receipt of the R2 form from the retailer, issue the completed L2 form
- upon the satisfactory receipt of the R3 form from the retailer, issue the completed L3 form
- when applicable, issue site notices under instruction from the centre management team
Typical Duties

- **Handover** – for retailers that are entering the shopping centre for the first time, or moving units, Cyril Sweett will ensure that the centre team can hand over the unit to the retailer in accordance with the agreement for lease through:
  - review of any specification that has been agreed with the retailer
  - inspection of the unit to be carried out and issues highlighted and recorded
  - meter readings taken and agreed
  - relevant documentation issued

- **Fit-out** – during the fit-out stage we seek to ensure that the works are technically and legally compliant and adhere to agreed design criteria through liaison with the shopping centre teams. Upon instruction we will issue any required site notice and liaise with the centre to ensure a satisfactory change to their working practices of the contractor or design has been achieved.
  - During the fit-out, if a change is made to the previously advised scheme we will review any submitted plans to ensure compliance with the centre criteria and work with all parties to minimise the risk of a delay to the programme.
Typical Duties

• **Co-ordinate the consent to trade (no inspections); (Stage R4)**
  • advise the retailer of the commissioning certification that is required
  • receive, collate and issue to the centre the commissioning documentation
  • agree an inspection date with the retailer and advise the retail delivery architect of when their attendance is required
  • receive, collate and issue to the centre the snagging comments from the retail delivery architect and the wider retail delivery team
  • agree a date with the retailer for the completion of the snagging items
  • issue the L4 consent to trade form, along with the snagging comments to the retailer
  • receive, collate and issue to the centre the ‘as-built’ drawings, the health and safety file and the operation and maintenance (O&M) manual

• **Commissioning –**
  It will be the retailer’s responsibility to arrange for nominated contractors to inspect and commission systems as applicable. We will ensure that they are provided with the correct contact information and advise the retailer to make contact in a timely manor to ensure there are no delays towards the end of the programme

• Prior to reaching this stage we ensure that the contractors and architects appointed for each retailer are working on providing the required information.
• A tenant co-ordinator can manage approximately 20 to 25 units simultaneously.
• Unit handovers are time consuming. This needs to be considered when setting milestones.
• Design Team appointments
• Main contractor obligations
Part III.
Lease co-ordination

a. – Leasing Agent meets tenant
b. – Leasing Agent reviews deal with tenant co-ordinator
a – Leasing Agent / Tenant

- Review premises, location and provision
- Review standard spec. and agree variations
- Primary issue will be rentals and contributions
- Agreement on split of Landlord / Tenant works. Example:
  - Shopfronts
  - Screeds
  - Openings
  - Vertical transportation
  - Services
Deals with the co-ordination of landlord shell and retailers special requirements

- Feasibility study
- Negotiation issues
- Heads of terms
Prior to full agreement to lease a list of ‘responsibilities’ is drafted to highlight both the tenants and landlord expectation.
b. Leasing Agent / Tenant co-ordinator

- Confirmation of agreed issues related to lease obligations.
- Formal transfer of tenant management to tenant co-ordinator
Retail Delivery ensures that the design of the retail environment is a key issue throughout the life of the project.
Retail Delivery Flow Process
The 4 steps for successful design & fit-out

1. Retailer Briefing
   - Introduce Retailer to Retail Delivery
   - Retailer invoice raised for Retailer shop fit deposit
   - Issue of Inspire & Inform Retailer’s Handbook
   - Retail Delivery Team issue Briefing Minutes

2. Design Review
   - Design Review and discussions
   - Settle Retailer invoice, including any works undertaken by landlord on Retailer’s behalf as appropriate
   - Retailer submits Concept (Form R1) & Detail design (Form R2)
   - Retail Delivery Team comments (Forms L1, L2)
   - Retail Delivery Team sign-off

3. Pre-Start Handover & Fit-out
   - Meet to review the site constraints
   - Retailer to submit Health & Safety Plan
   - Review Commissioning Guide and Consent to Trade requirements
   - Completion of legal documentation
   - Retailer submits pre-start information (Form R3)
   - Pre-Start Meeting
   - Handover notification (new Retailer) (Form H1)
   - Pre-Start Information Acceptance (Form L3)

4. Completion & Consent to Trade
   - Retailer submits: Commissioning Certificates, Health & Safety File, O&M Manuals & As-Built Drawings
   - Reconciliation of costs & deposit
   - Retailer submits Commissioning Certificates (Form R4)
   - Consent to Trade (Form L4)
Progress is tracked for each retailer and a schedule issued to the client on a weekly basis.

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<th>Unit Ref</th>
<th>Type of Works</th>
<th>Retailer</th>
<th>Concept L1</th>
<th>Detail Design L2</th>
<th>Pre-Start Meeting L3</th>
<th>Start on Site Date</th>
<th>Consent to Trade L4</th>
<th>Actual Trade Date</th>
<th>Last Site Visit by CSL</th>
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<td>NEW</td>
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<td>24-Feb-09</td>
<td>02-Mar-09</td>
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<td>R17B</td>
<td>FF</td>
<td>Fat Face</td>
<td>B</td>
<td>A</td>
<td>27-Feb-09</td>
<td>09-Mar-09</td>
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<td>R17A</td>
<td>NEW</td>
<td>Accessorize</td>
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<td>B</td>
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<tr>
<td>SU5</td>
<td>NEW</td>
<td>All Saints</td>
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<td>A</td>
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Step 1 - Retailer Briefing

- Introduce Retailer to process and tenant co-ordinator
- Issue the Inspire and Inform handbook
- Review the constraints document
- Raise invoice for shop fit deposits
- Ensure meeting is minuted
Inspire
Retail Delivery
Our approach

The Process
Retail Delivery is the process by which high quality and exceptionally imaginative retail offers are guided and managed in a timely manner with minimal risk to both Retailer and the Landlord, and in full compliance with the centre’s technical, legal and design/branding requirements.

A vision
In line with the Retail Delivery Process, a vision for WestQuay has been developed so that the mall environment reflects the centre’s market position and strategic goals.

This ensures that visitor profiles reflective of the extremely affluent catchment area are attracted and retained, and that revenue is maximised.

Collaborative
Our team aim is to work with individual Retailers, drawing on our extensive experience within the retail sector, offering expertise in design guidance, project management and technical compliance.

Design guidance
Each Retailer’s store concept is taken through a process to ensure quality, consistency and a high level of design, ensuring both the individual Retailer and the centre’s brand presence is optimised.

Project management
Each Retailer has a single point of contact to enable queries and the implementation process to be dealt with in the fastest and most efficient way.
Step 2 - Design Review

Tenant to provide:

- Plans, sections and elevations
- Technical details of services
- Illustrations of merchandising and image
- Signage details
- Materials and samples
- Demonstrate that the design complies with the centre design objectives, and raises the design standard.
Merchandising

The Dress
Midfloor unit

Lipsy "The Dress" Mini Line

Lipsy "The Dress" Camper Unit

THE DRESS UNIT
Lipsy Dress Over
Mid Floor Unit B

FOCAIN SINGLE SIDE HANGING RAIL WITH HANGERS @ 300MM intervals - TOTAL 14 PIECES.
Example

- 1st Hollister to open in the UK, traded from 24 Oct 08
- Does not conform with the centres Inspire:Inform guide
- Mall Ceiling height adjusted to suit their requirement for 12’ clear height
- AUM Project to ‘enable’ the space
- Structural Column removed from the shop front
- 16no. 14m deep piles on 2 new pile caps to support new steel frame
• Preliminary design, to agree overall concepts,
• Agree on further landlord works, and receive deposits.
Detailed Design Submission

- Includes requirements for
  - Architecture
  - Fire Strategy
  - Structural Alterations
  - Accessibility
  - Life Safety Systems
  - Water and Drainage
  - HVAC
  - Power and lighting
  - Communication
  - Refuse
Step 3a - Pre-start

- Meet to accept unit
- Meet to review site constraints
- Review commissioning requirements
- Complete legal documents
- Formalise handover in accordance to lease milestones
Step 3a - Pre-start handover

Typical Agenda

- Introductions
- Site Inductions
- Contact details
- Conditions to Start
- Site organisation
- Hoarding requirements
- Temporary services
- Condition surveys
- Risk Items
- Intranet Systems
- Control of noise and dust

- Access to unit
- Site Compound
- Vehicle access and parking
- Security
- Waste Management
- Signboards
- Accredited visitors
- Neighbours
- Permits to work (Hot work)
- Health and Safety
- Contract periods
- Method statements
• Finance
  – Deposits
  – Insurances

• Commissioning
  – Sprinklers
  – Alarms
  – Chlorination certificate
  – Emergency lighting
  – Electrical Certificate

• Statutory Approvals

• Consent to Trade
  – O&M manuals
  – Health and safety manuals
  – As built drawings
  – Return of deposits

• Any other business
Tenant Handover pack

- Recommended to provide a handover pack, to certify unit compliance with lease.
  - Updated as built drawing
  - Dimensional survey
  - Level survey
  - Utilities
  - Screed humidity content
Step 3b - Fitout

- Form R3 - Pre Start Submission
Step 4
Completion - consent to trade

- Final inspections
- Retailer submits as built drawings, commissioning certificates, operational manuals etc.
- Prepare and agree final reconciliation of costs
Each Step supported by documentation to record the Retailers progress through the Retail Deliver Process.
Summary

- It is the first impression that the Tenant has of dealing with the centre.
- The tenant (Landlords client) is a retailer, not a builder
- The tenant co-ordinator is to manage and facilitate, to the benefit of both parties.
- It is the landlords opportunity, to raise the standard of design within the centre.
Class Evaluation:

Please remember to complete the class evaluation by using your smartphone or tablet.

Class Evaluations Link:

survey.icsc.org/2014ERPS