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# SHYFT

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**PREPARED FOR:**  
Prospective Clients  
2021

## SHYFT Firm Profile

# Firm Profile

**At SHYFT, our mission is to provide integrated real estate, design, and construction services that help people and organizations navigate real estate change with confidence.**

## Empowerment and Results

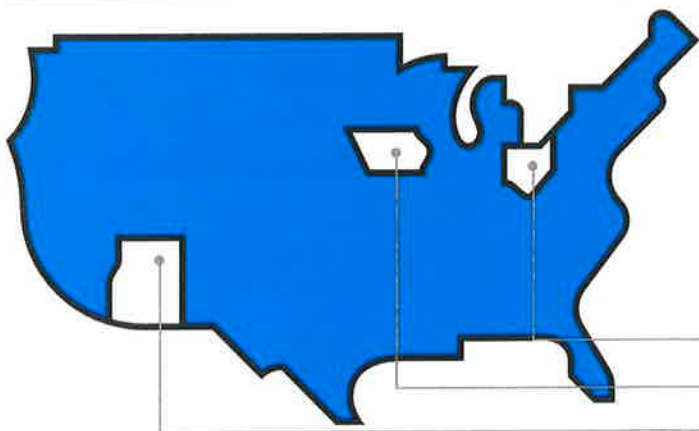
We are able to deliver successfully on that mission by first focusing on the reasons behind your change. We want to get to know you and your organization and truly understand why you need to make a move, expand or build a new space. Only then can we serve as your trusted advocate. We understand how important it is for your organization to leverage real estate as a calculated business advantage. You can be assured that through our balanced, transparent approach, your organization will get the space it needs and you will be informed and empowered during the process. Not only will you be able to measure ROI based on profits, productivity and time, but we are driven to create outcomes that lead to improved employee engagement and enhanced brand equity. The best part? You will have fun working with us!

## Custom Solutions for Unique Goals

We realize no customer or project is the same. We offer our services individually or collectively. This way each solution is customized to meet your unique goals. All our services are integrated under one roof, which is a strategic advantage to any project.

## A Culture of Collaboration and Growth

The SHYFT culture fosters success among our individual team members. We collaboratively challenge one another to provide better ways to service the market and perform our work. We develop career paths and goals that are unique to the individual, while supporting one another to achieve professional growth. We also invest in our home communities by donating services and volunteerism to non-profit organizations and civic leadership.



**“Our clients come first. We understand our success comes from their success.”**

**- Brandon Foldes, Principal & CEO**

**Columbus, OH**

**Des Moines, IA**

**Scottsdale, AZ**

# A Better Way to a Better Space

**SHYFT's goal is to improve the way organizations navigate real estate change by making the process more transparent, the data more helpful, and the experience more enjoyable.**

Our unique planning and delivery process brings together the essential skill sets from the project's initiation and develops a custom solution through an integrated approach to maximize the return on your goals. We unburden you by providing a full picture of all the options and the impact of decisions on the bottom line before carefully crafting a plan that meets your goals. Our integrated services are all under one roof resulting in well-rounded solutions that balance aesthetics, functionality, timing and budget. Our in-depth market research and financial analysis provides helpful data for decision making where it really counts. Our process transparency empowers project owners and builds trust.

## Our Values (CATER)

**Be Collaborative**

**Be Accountable**

**Be Transparent**

**Be Engaged**

**Be Real**



## Our Tool Box

**A good project team uses numerous tools. SHYFT's team is the complete tool box with valuable resources and relationships, to ensure your project objectives are achieved with the least amount of risk.**

Comprehensive project assessment

Understands fiscal considerations and cost implications

Strategically plans project development and coordination

Provides direction and structure for project

Architectural creations that align with constructibility requirements

Executes campus projects with organization and transparency

Sets budgets and timelines based on accurate information from resources

RFP creation and solicitation with expertise to provide concise bid leveling

Mitigates risk and confusion assuring quality and efficiency

Administers contracts and cost controls

Collaborates with partners and vendors on the project ensuring your goals are met

Monitors and reports project progress against budget and schedule

A partner and advocate

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# Services Profile

**Businesses and organizations are constantly experiencing change, business acquisitions, real estate, technology and workforce change, or workplace culture evolution. Business leaders look for unique ways to maximize their return on investments, and real estate done right, can be one of them.**

Business today is driven by change, and change is constant. Our talented team addresses change head on by utilizing industry best practices to instill confidence that your project is driven by the vision and mission of the organization. We deliver exacting results which can be measured in employee morale and productivity, enhanced brand equity, advantageous financial positioning, increased sales and profitability and other measureables that define success for your business. We are your advocate and consultant throughout the entire change process.

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## Strategic Planning

SHYFT simplifies the strategic planning process and handles the details so you can focus on the big picture. We begin by listening. Listening to the issues you've encountered in the past. Listening to your goals for the future. Listening to WHY this move is essential to your business. We listen to what is most important to you. We work as an extension of your team to ensure you get a 360-degree solution that suits your business, your people and your clients. With a solid real estate plan in place, you can rest easier knowing you've explored all the options and have confidently made the best choice for your business.

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## Architecture + Design

SHYFT architects and designers study your business to understand how people work together, communicate, and serve your customers. Next the team develops a plan that suits your company's individual culture and business goals. This personalized approach improves efficiency and effective decision making for your leadership, while allowing you to focus on business goals.

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## Project Management

When a plan moves into the execution phase, it is critical to stay on top of every aspect of the project. SHYFT is with you every step of the way. Whether you're remodeling or moving into a new space, you will always know how the project is progressing with our detailed tracking system and commitment to constant communication. Experience the peace of mind that comes with having a dedicated professional to manage the project, engage contractors and compare bids, alert you to changes or challenges, and update you on the project's timing and budget. No more surprises!

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## Integrated Project Delivery

In design and construction, how projects are delivered determines how teams work together. The preferred SHYFT delivery model fully integrates our team of architects, engineers, project managers, real estate finance managers, real estate brokers, construction managers, schedulers, and contractors to take advantage of the knowledge of all team members to maximize the project outcome. SHYFT IPD is the highest form of collaboration because all three primary parties (Owner, Architect, Constructor) are aligned.

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## Construction Management as an Agent (CMA)

Construction management and project coordination requires expertise to manage and evaluate bids and coordinate schedules of selected contractors, subcontractors, and vendors. It takes valuable time to learn how to manage progress in the field in order to identify and resolve issues as the project is executed. SHYFT construction managers partner with you to ease that burden and risk.

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## Owner's Representation

We tailor specific Owner's Representation services to meet the client's project needs. For most clients this complements their own in-house staff and capabilities. We help provide a complete project management program to navigate the complexities of today's building projects. Our project management program includes setting up processes for project delivery from pre-construction through owner occupancy and closeout for building projects.

# Strategic Planning

**There are a lot of moving parts when planning a new project: finding the right location, planning how to use space, coordinating with IT and HR, communicating with employees, etc. It can be overwhelming.**

But does it have to be? SHYFT simplifies the process and digs into the details, so you can focus on the big picture. We begin by listening. Listening to the issues you've encountered in the past. Listening to your goals for the future. Listening to WHY this project is essential to your business. We listen to what's most important to you. Then we get to work formulating a plan that works for you, your people, your process and your property. We work as an extension of your team for a 360-degree solution that ties your business plan to a well-defined real estate plan. With a strategic plan in place you will know that you've seen all the options, compared solutions, and confidently made the best choice for your business.

## Our Strategic Planning Capabilities Include:

**Conduct Leadership Visioning and Goal Planning Workshops**

**Consensus Building through Surveys and Workshops**

**Current Space Assessment and Evaluation**

**Real Estate Scenario Financial Analysis**

**Review Market Research and Comparable Sites**

**Analyze Collected Information to Define Potential Paths**

**Review goals, market trends, and success stories**

**Program and Right-size the project to your needs**

**Create a road map [GPS]**



## Projects that have employed our Strategic Planning Services Include:



# Architecture & Design

**Good design is good for your business. Strategically designing your space promotes productivity and engagement among your employees and ensures a positive experience for customers.**

Our architects and designers study your business to understand how people work together, and individually, to communicate and produce work each day. We then utilize our talents and tools to develop upon this information and hone in on the form and function that offers the most effective solution.

Our design team will deliver ideas that align with your company's unique culture and business goals. This personalized approach is intended to improve your company's productivity and employee experience to help you achieve your business goals. Additionally, our specialized design promotes an increased real estate investment value for your organization.

## Our Architecture and Design Capabilities Include:

**Space Utilization Assessment**

**Full Design Process**

**Interior Design Development**

**Master Planning**

**LEED Specialization**

**Workplace Standards + Pilot Programs**



## Projects that have employed our Architecture and Design Services Include:

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# Owner's Representation

We are a talented, on-demand work force that can be augmented to your existing in-house staff or serve as "in-house" staff where flexibility and variability is needed. Our team has highly trained and skilled specialists from all areas of industry including architects, engineers, project managers, real estate finance managers, real estate brokers, construction managers, schedulers, contractors and more. This multi-discipline background allows us to provide Owner Representation services for a variety of situations.

Owner's Representation services are specifically tailored to meet your project needs. For most clients this complements their own in-house staff and capabilities. Our complete project management program will help you navigate the complexities of today's building projects with confidence. The comprehensive program covers all processes from pre-construction through owner occupancy and closeout for building projects. Tell us about your goals and we will make them happen.

## Our Owner's Representation Capabilities Include:

- Vendor procurement coordination**
- Bid analyses and recommendations**
- Change order management**
- Consultant selection and negotiations**
- Design and construction oversight**
- Documentation and reporting**
- Financial tracking and cost controls**
- Owner's representation and advocacy**
- Product budgeting and scheduling**
- Project delivery oversight**
- Project closeout oversight**

## Projects that have employed our Owner's Representation Include:





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# Construction Management

Your time is valuable and your company is counting on you to do your job. A construction project takes significant time away from where you are needed most. Construction management requires specific expertise to manage and evaluate bids and coordinate schedules of selected contractors, subcontractors, and vendors. We have extensive industry knowledge and decades of experience managing progress in the field to identify and resolve issues as the project is executed. Our transparent, collaborative approach creates a uniquely empowering experience that will ease your burden and mitigate risk, while keeping you informed so you can make the tough decisions with confidence.

**Our focus is on representing your best interests through project execution, while you focus on your business' success.**

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## Construction Services We Provide:

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- Project Planning and Scope Development**
- Design Acquisition and Management**
- Milestone Scheduling**
- Construction Budgeting**
- Bid Solicitation and Contracting**
- Jurisdictional Coordination/Permitting**
- Constructability Review**
- Contract and Construction Administration**
- Closeout Documentation Coordination**
- Warranty Analysis**
- Property Assessment**

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## SHYFT Construction Abilities Include:

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SHYFT has the ability to operate as General Contractor, Construction Manager as Contractor (CMC), and Construction Manager as Agent (CMA). Our preferred delivery model is that of CMA, because we act purely as a trusted advisor of the Owner, helping you from project initiation through completion. In fact, owner representation is the foundation on which SHYFT was built.

As CMA, we act on behalf of the Owner overseeing the project, preparing all contract agreements, administering in-field project management of the trade contractors, and preparing all billings on behalf of the Owner (for the Owner to make direct payments to the multiple vendors). In this delivery model, the Owner remains responsible for the overall budget and schedule. GC and CMC delivery models offer other potential benefits to clients, depending upon the project, which we would be happy to discuss with you further.



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# Integrated Project Delivery

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**In design and construction, how projects are delivered determines how teams work together. Common methods SHYFT participates in vary from Design-Bid-Build, Design-Build, Construction Management and Multi-Prime Delivery. However, none fully address the collaboration issues that can occur in projects except our Integrated Project Delivery (IPD) method.**

Take a moment to think about issues you've seen or heard about projects. Most often those issues are not the weather, equipment or obstacles; rather, incompatible, adversarial relationships, unclear expectations and confusion about roles and responsibilities that create project chaos for Owners. Revisions, disagreements, poor productivity and other problems arise from a lack of communication and project management—and the larger the project, potentially the bigger the problems.

The preferred SHYFT delivery model fully integrates our team of architects, engineers, project managers, real estate finance managers, real estate brokers, construction managers, schedulers, and contractors to take advantage of the knowledge of all team members to maximize the project outcome. SHYFT IPD is the highest form of collaboration because all three primary parties (Owner, Architect, Constructor) are aligned. Our preferred model is gaining popularity among owners because it unlocks collaborative creativity, drives reliability, and successfully delivers complex capital projects. By bypassing the conventional and often flawed methods of running a project; IPD can streamline the process, ensure every member of the team is empowered with a clearly defined role, and even cut costs.

The ingredients for success at SHYFT include a passionate commitment to identifying problems, collaborating, flexibility in adapting to new and evolving roles, and a willingness to comment on any facet of the design process, which allows for participating in collective decision-making to resolve issues.

SHYFT Integrated Project Delivery operates differently than conventional project management methods which often results in more productivity, efficiency, reduced risk and loss. The project focus shifts from “how does my organization succeed” to “how do we ALL succeed.”

At SHYFT, our entire team is available to an owner before a construction project breaks ground. Project incentives and goals are aligned for the design and construction teams, so opportunity for project success is increased. Our digital tools, specifically designed for design/construction collaboration, can magnify the success of a project overall and provide the most ROI.

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## Integrated Project Delivery CONTINUED

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### The Benefits of Integrated Project Delivery:

- Better outcomes**
- Open, easy collaboration**
- Transparency**
- Equal Representation**
- Single Agreement**
- Precision Estimates**
- Increased Efficiency**
- Cost-Efficient**

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### Before selecting a project delivery method, start comparing the criteria that are most important to your project's success

- Budget:** how much to spend
- Design:** what the final project will look like and how it will function
- Risks:** exposure to financial loss and harm to the brand
- Schedule:** a timetable for completion
- Owner Expertise:** company's experience in similar projects

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### SHYFT Project Examples

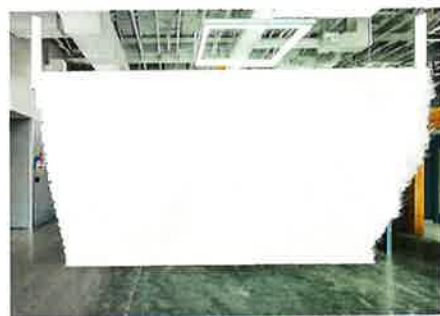
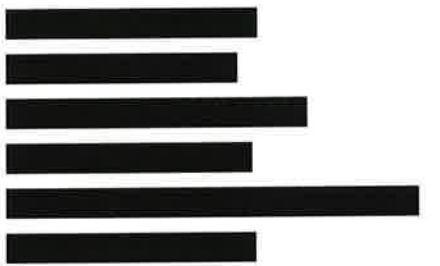
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# Relocation Management

**Years of move management experience reveals a simple perspective: Move equals change, and change is unsettling. A detailed move plan tailored to align with the corporate culture results in a seamless, organized and efficient process with minimal distractions.**

When it's time to move people from point A to point B, we're here to help. We will work with you to develop a seamless transition plan with minimal to no downtime to reduce any loss of productivity. Part of that plan includes communication that clearly tells employees why this move is important and what to expect before, during, and after the move. Your employees will be welcomed to their new functional space with support from the SHYFT team to troubleshoot, answer questions and provide direction as each individual begins their work.

## Projects that have employed our Move Management Services Include:



## Our Core Move Management Services Include:

- Develop move execution and logistics plan
- Create Master Vendor List. Consult with Owner to determine if contracts will expire or migrate as part of relocation to new site. SC will manage vendor expiration/migration
- Detailed Move Schedule creation
- Move Services Request-For-Proposal (RFP) Packages: Create RFP package, solicit proposals, facilitate pre-bid meeting, facilitate review process with Owner, create proposal analysis/comparison, assist Owner with selection, and facilitate negotiation & contracting process
- Manage and oversee selected move vendor
- Move spreadsheet template creation (to be completed by Owner)
- Move spreadsheet coordination with Owner
- Color-coded move map creation
- Periodic pre-move site visits
- Facilitate periodic move planning meetings with Owner
- Ongoing correspondence with owner to address staff concerns, FAQ's, and general coordination.
- On-site move execution oversight
- Facilitate the Move Vendor's "substantial completion", punchlist creation, and timely punchlist completion

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## Relocation Management CONTINUED

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### **Our Core Move Management Services Include:**

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- Create Change Management Plan
  - Create and publish 1-month pre-move “look ahead” schedule
  - Move information HQ website
  - Pre-move checklist creation
  - Track, document, answer, and publish project FAQ’s
  - Pre-move town-hall meeting with associates
  - Move-in checklist creation (to be used on first post-move work day)
  - “Welcome to Your New Workspace” document creation
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### **Our Core Site Decommissioning Services Include:**

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- Detailed lease review to outline and document landlord/Owner decommissioning requirements (ie. Signage removal, cabling infrastructure, etc.)
  - Conduct landlord walkthroughs and sign-offs (pre-decommissioning, punchlist, post-decommissioning)
  - Decommissioning Services Request-For-Proposal (RFP) Packages: Create RFP package, solicit proposals, facilitate pre-bid meeting, facilitate review process with Owner, create proposal analysis/comparison, assist Owner with selection, and facilitate negotiation & contracting process
  - Manage and oversee selected vendors hired for decommissioning
  - Create, manage, and oversee completion of decommissioning punchlist
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### **Other Resources**

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[\*\*Best Practices for Effective Change Management\*\*](#)

[\*\*Best Practices when Consolidating Associates Into A Smaller Space\*\*](#)

[\*\*How Do I Successfully Plan and Execute an Office Move?\*\*](#)

[\*\*What Are The Top 5 Issues I May Have When Remodeling or Relocating My Business?\*\*](#)

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