

CASE STUDY

The National Association of Telecommunications Officers and Advisors® (NATOA®) utilized Meridian Relocation Services to conduct a Feasibility Study for the relocation of its national headquarters to determine total cost, timeframe, logistics and potential challenges related to the move and first year of operations.

"When I needed to know how much, how long and exactly what would be involved with moving my headquarters' operations and setting up a new office, I turned to Meridian Relocation Services. Meridian provided me with high-quality service in an expedited timeframe so that my association could make an informed decision on how to proceed."

Elizabeth Beaty

Executive Director, National Assn. of Telecommunications Officers and Advisors®

Whether to relocate a national association is never an easy decision. When NATOA® faced the issue of whether to migrate out of an association management company, it brought in Meridian Relocation Services to provide some much-needed answers so that an informed decision could be made on how to proceed.

First, what are the real costs associated with creating new office systems, infrastructure and staffing levels? Then there was the

question of whether such a move could occur within the needed three-month transition period. And there were the logistics of how to plan such a transition without hampering member services or NATOA's® daily operations.

"There are many hidden issues and costs related to a relocation and new-office set-up," said Jacci Duncan, president, Meridian Relocation Services. "That's why it's important to undertake a full assessment of

CLIENT PROFILE

National Association of Telecommunications Officers and Advisors®

A national professional trade association that represents the telecommunications needs and interests of local governments, and those who advise local governments.

Industry

Professional trade association - 501(c) 4

Location

Headquarters: Alexandria, VA

Staff Size

5

Project Summary

Meridian Relocation Services was hired to conduct a Feasibility Study and create a relocation budget to assess and compare two operating scenarios: NATOA's® then-current situation of operating within a management company vs. operating as a stand-alone entity.

Timeframe

Four weeks

Benefits

- Cost-benefits analysis of continuing to operate at a management company vs. operating as a stand-alone entity.
- Comprehensive assessment of what is involved with creating a fully-functioning office in an expedited timeframe with minimal disruption to operations and member services.
- Creation of key relocation planning documents, such as a master schedule, and identification of key accomplishments.
- Recruit key staff members.
- Time and cost savings by utilizing analysis reports of vendors, including telecommunications, computer/IT and furniture that met the specialized needs of NATOA's® operations.
- Industry insight and efficiency to create such things as an employee benefits package and identify provider options for administering employee benefits, payroll and HR duties.
- Having a professional serve as the destination liaison to facilitate the office-set up and keep the process on track.
- Access to relocation counseling throughout the process on strategies, troubleshooting, pitfalls to avoid, insider knowledge and methods for efficiency.
- Determination of staffing levels and outsourcing needs.

the situation to gain a thorough understanding of your options and what is involved with each, including a what-if scenario of an office relocation.”

In just a four-week time period, Meridian worked closely with NATOA® to create a feasibility study that assessed and compared two completely different operating scenarios – continuing its operations within the framework of a management company vs. the transition to a stand-alone entity.

The key elements of each scenario were analyzed and included total costs, timeframe and scheduling, logistics, effects on member service and daily operations, and the identification of the pros and cons of each situation.

Central to the report was The assessment and determination of exactly what would be involved with a headquarters relocation – and just as important, what the first few years of operation in that new situation would look like financially.

By undertaking a marketplace assessment of actual costs

related to office space, staffing and business administration, Meridian began documenting the scenario of operating a new office.

This resulted in providing NATOA® with estimated expenses for the one-time relocation expenses - such as cabling and installation fees – as well as the total annual

“Establishing NATOA’s® first national office as a stand-alone organization seemed insurmountable at first- especially in light of the already heavy demands of managing member issues and running the association on a day-to-day basis. Meridian Services changed that by providing me with the resources and knowledge to realistically assess my situation and plan the transition wisely. Meridian is knowledgeable, efficient, organized and flexible – exactly the qualities needed to complete the job during a time of upheaval.”

Elizabeth Beaty
Executive Director, National Association of Telecommunications Officers and Advisors®

operating costs at the new facility-including salaries and benefits. This, combined with the relocation plan and timeline, as well as the challenges involved, allowed NATOA® to make a reality-based decision on whether to move its office.

IMPLEMENTATION STRATEGY

- Create a budget and cost-benefits analysis by identifying one-time relocation expenses and operating costs for the first year of operation at a new facility.
- Conduct a Needs Assessment of NATOA® operations to determine strengths and weaknesses related to continuing with the management company vs. beginning operations as a stand-alone entity.
- Conduct a marketplace assessment to determine relocation requirements and logistics, including office space criteria and availability, and staffing levels.
- Focus on the identification of potential challenges to an expedited relocation effort for NATOA®.
- Identify the best methods for operating systems and administration, including outsourced needs for accounting and events management.
- Create a relocation implementation schedule and highlight the major tasks that need to be completed.