

Move Management

Patricia Henriques

Moving a business, institution, or government agency requires complex planning, coordination, and careful execution—particularly where critical operations must be maintained. By offering move management services, architecture firms can support clients every step of the way to make moving as painless as possible.

Summary

MOVE MANAGEMENT SERVICES

Why a Client May Need These Services

- ▶ To relocate staff and assets within existing facilities
- ▶ To relocate staff and assets to new facilities
- ▶ To engage a single-source service for relocation needs
- ▶ To supplement the client's facilities management capabilities

Knowledge and Skills Required

- ▶ Planning, problem-solving, and management skills
- ▶ Knowledge of moving industry
- ▶ Knowledge of business operations
- ▶ Knowledge of furniture installation services
- ▶ Strong interpersonal and communication skills

Representative Process Tasks

- ▶ Planning
- ▶ Pre-move preparation and coordination
- ▶ Transport of assets
- ▶ Post-move follow-up

Move management firms provide planning, scheduling, budgeting, and coordinating for organizations that are moving. These services help minimize (or eliminate) downtime and moving expenses and may also assist the client with move-related personnel, administrative, and facility tasks.

According to the International Facility Management Association, companies move, remodel, or relocate approximately 30 percent of their facilities each year, based on square footage. Only about 15 percent of these moves are into newly constructed facilities. A move is a good time to implement new work processes and technologies in order to control costs and increase profitability and productivity. With proper planning and management, these objectives can be achieved. On the other hand, a poorly executed move creates downtime, additional moving expenses, worker stress, and decreased productivity.

In the last 10 to 15 years move management services have emerged and become an accepted part of the relocation process. Demand is steadily increasing. Moving today's organization requires a lot more than furniture movers and a van. In many organizations moving requires the orchestration of many specialists and technicians to handle technology relocation (e.g., data centers, local and wide area networks, PBXs, and ISDN telephone systems). Few organizations have the resources to manage both the strategic and tactical aspects of a move, particularly when the schedule is aggressive.

CLIENT NEEDS

Move management services can be prompted by a variety of corporate needs or actions, including reorganizations, staff reductions, mergers, special development projects, and lease expirations.

A variety of clients need move management assistance. Clients with valuable assets that must be handled carefully (e.g., research laboratories, manufacturing facilities, and museums) are especially likely to seek out the service.

Airports, broadcast facilities, hospitals, and other organizations that must maintain critical and/or complex operations during a move usually require the support of capable move management consultants. Contingency plans and redundant operational systems are important components of the move management strategy in these cases.

Clients who have never experienced a major relocation, who haven't moved recently, or who have had a negative experience during a move are good prospects for this service.

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Any organization where move scheduling and downtime are concerns can benefit from this service. Smaller organizations are unlikely to have in-house resources that are free to manage the move. Larger organizations with facility management staff also hire move management consultants, especially if the organization has a high rate of churn. Retail is one of the few sectors that does not use this service, because inventories usually are not moved. New retail facilities are stocked with just-in-time deliveries.

Government agencies often bundle move management services with procurements for design or construction services, or they may issue a separate procurement.

Architecture, A/E and E/A firms, real estate brokers, and design-build companies often offer move management services as a deal closer when potential clients express reluctance to build or lease a new facility because of anxiety about moving. While these types of organizations are starting to offer move management as an ancillary service, teaming with firms that specialize in move management frequently is required, particularly in more complex projects where the client has specialized needs.

 **Strategic facility planning and facility management services frequently involve the relocation of people and facility assets.**

Most major metropolitan areas now have move management specialty firms. These firms offer an impressive range of services that include project planning and management, technical systems consulting, project coordination, move coordination, and employee or customer orientation and communications. Their services are distinctly different from those of moving companies, which focus only on the tactical aspects of the move and do not involve any strategic planning.

For new organizations, the move management team may offer complete start-up assistance. This would include preparing a business plan, administrative procedures, and other management tools to help the client establish operations. Similarly, clients with existing operations may require the move management team's assistance in determining how procedures and protocols might change as a result of relocation.

Most clients recognize the value of communications programs and include them in their move program. Employee and customer orientation and communications programs may include relocation handbooks and brochures, Web sites, bulletins, and hotlines.

Other related services that architects might package with move management services include strategic facility planning, space planning, facility management, facility surveys, commissioning, and postoccupancy evaluation.

Compensation for move management services normally ranges from \$0.75 to 1.50 a square foot, depending on the scope of work. Companies in the United States spend about \$10 billion a year on products and services related to moving.

SKILLS

Move management projects require expertise in planning, business operations and management, and contingency planning. People with backgrounds in facility management, real estate, or space planning are good candidates for project managers. Knowledge of the moving industry is a must.

All members of a move management team must have excellent problem-solving and interpersonal skills. Clients who are moving are under enormous stress, particularly while the relocation is actually taking place. The move managers must be able to convey competency and reliability and exhibit grace under pressure. Move management is a business based on trust. Reputation is extremely important, as clients are placing all of their business assets in the hands of the move management team during the time it takes to accomplish the physical relocation.

During the physical move, a move management team should have at least three members present—someone at the origin location, someone at the destination location, and a third person at the “command center.” The inventory team members need to be high-energy, detail-oriented problem solvers who can follow instructions. Their main function will be to track the movement of the client's assets.

The move management team members need to orchestrate the work and manage the procurement of movers, furniture installers, electricians, cable installers, and data and communications specialists. Skill in selecting these service providers is critical to the success of the move. In selecting a moving firm, for example, professionals check the firm's damage

record, its reputation for on-time services, its proposed approach and schedule, its contingency plans for bad weather, and its ability and experience in providing 24-hour shifts. Selecting good systems furniture installers is especially critical to scheduling because systems furniture takes longer to assemble and disassemble, and the work must be conducted on time and properly or there will be difficulty with cable and wire installation. Most moves now require a “PC SWAT team” to test, disconnect, reinstall, and retest computer workstations. The competency of these and other technical service providers plays a crucial role in determining the amount of operational downtime the client will experience.

Depending on the project, very specialized services may be required. Research or health facilities, for example, may need to move radioactive, biological, or chemical materials that require special handling. Chemical testing specialists and movers who handle hazardous materials may be required. Another example of specialized needs would be a residential health care facility where patients with critical care requirements would have to be transported. The move management project manager may have to conduct considerable research to determine the best way to handle specialized needs.

PROCESS

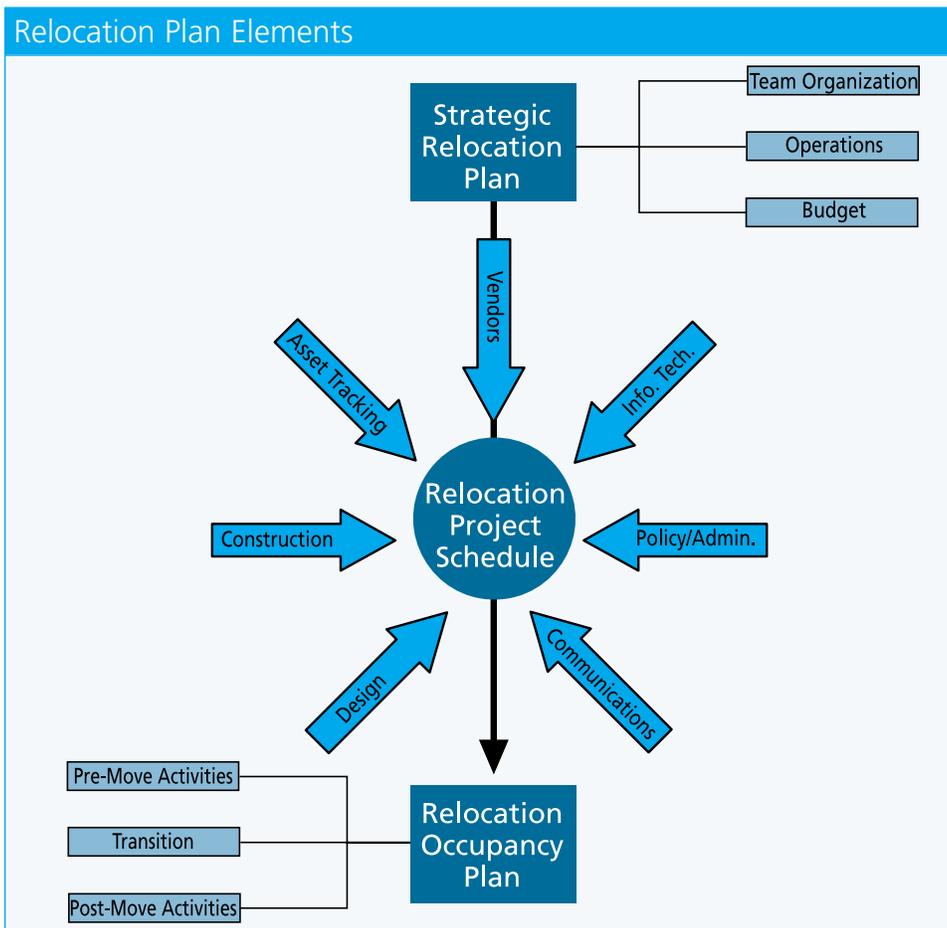
Major factors that could affect the scope of service include the size of the facility and quantity of its assets, the amount of assets requiring special handling, conditions that might require special access restrictions or security, the complexity of operations and whether continuous operations are required, and the degree to which in-house staff is available to assist in move management. Distance normally is not a major determination of scope because it impacts only the time required for the physical move. The duration of the project services usually relates to the size of the facility. Moves of less than 50,000 square feet require

6 months of planning; larger moves take at least 12 months. Complex facilities such as data centers, hospitals, and research-and-development facilities may require 18 to 24 months.

When developing a teaming approach for a move management project, it is important to have backup for both strategic and tactical functions in case someone is not available on the day of the move.

Generic Steps to Perform the Service

Planning. The first step is to interview representatives of key departments within the organization to identify the major issues involved with the move and special needs that should be considered. Some of these issues may include move scheduling related to ongoing operations schedules, any critical operations that must be maintained, the range of acceptable downtime (if any), whether contingency planning will be required, and the sequencing of the move and priorities.



Management Alternatives, Inc.

Objectives for the move are discussed and clarified. Ideally, a move will reduce or control operating costs, improve productivity, and increase profits. The degree to which the organization wishes to explore management and operating procedure improvements as part of move planning should be discussed, along with the client's need for communications support.

Based on the client input, the move managers prepare a moving plan that defines the move objectives, approach, methods, team, schedule, and insurance requirements. A move budget is prepared based on the plan requirements. This budget should include move-related construction costs; move consultant and service fees; purchase of furniture and telephone, computer, and office equipment required in the new facility; expenses related to address change; costs related to downtime or productivity drops; and any other expenses that can be related to the move.

Next, the move management team surveys the destination site to determine utilization and conditions that will affect the approach to delivery, unloading, installation, and final setup of furniture and equipment. The quantity of new furniture and equipment to be ordered for the new facility is verified.

The move management team then develops a bid package including floor plans, inventory lists of furniture and equipment, and move plans and specifications. The move managers conduct tours of current and destination facilities so bidders can observe conditions. Qualifications and bids are received and evaluated by the move management team. Recommendations for move services are provided to the client based on cost and ability to fulfill the move objectives.

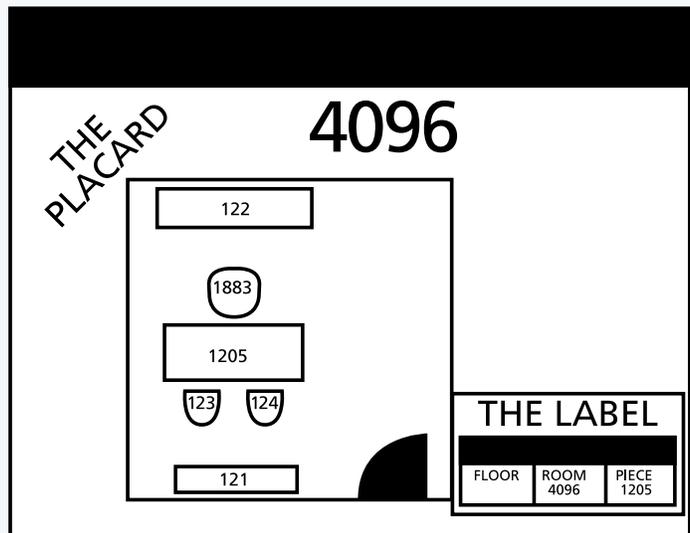
Pre-move preparation and coordination. The move managers oversee tagging, packing, and pre-move preparation. Employee or customer orientation and communications materials are produced, and distribution of the materials begins. Where required, simulation exercises may be conducted to rehearse procedures required in operational contingency plans.

Transport and on-site supervision. The move management team coordinates the move of existing assets, receipt of new furniture and equipment, and installation and setup times covered in the scope of work. Interim storage may be provided where required.

Post-move follow-up. The move management team assists the client in filing for necessary claims, auditing invoices, and disposing of any unneeded assets. A post-move punch list of outstanding issues is prepared. When these are resolved, the project is closed out.

Movement deliverables usually consist of a move plan that includes an asset inventory and a move project schedule and budget, agendas and action times for move coordination meetings, RFPs for moving and technical services, a relocation handbook, a move control report (a list of assets moved to the new facility), and a post-move punch list.

Tools for Move Control



THE REPORT

Date 01/01/95 Assigned Furniture Page 1

Room No. 4096 Name: Office 4096

Item No.	Description	W	D	H	Current Location
121	Bookcase—Adj Sh	36.00	12.00	54.00	0510 A
122	Credenza	72.00	20.00	38.00	0510 A
123	Seating—Side Arm	23.00	20.00	18.00	0510 A
124	Seating—Side Arm	23.00	20.00	18.00	0510 A
1205	Desk—Table	66.00	30.00	30.00	1258
1883	Seating—Managers	25.00	22.00	18.00	1453

▶ **A major relocation to new facilities may result in user concerns and problems about the new quarters. Postoccupancy evaluation services are a likely related service to address such issues.**

“Move Management” was originally published in *The Architect’s Handbook of Professional Practice*, 13th edition, ©2000 by the American Institute of Architects, published by John Wiley & Sons, Inc.

The AIA provides a contract document designed especially for alternative architectural services.

B102–2007, Standard Form of Agreement Between Owner and Architect without a Predefined Scope of Architect’s Services.

AIA Document B102–2007 is a standard form of agreement between owner and architect that contains terms and conditions and compensation details. B102–2007 does not include a scope of architect’s services, which must be inserted in Article 1 or attached as an exhibit. Special terms and conditions that modify the agreement may be included in Article 8.

The separation of the scope of services from the owner/architect agreement allows users the freedom to append alternative scopes of services.

AIA Document B102–2007 replaces and serves the same purpose as AIA Document B141–1997 Part 1.

For more information about AIA Contract Documents, visit www.aia.org/contractdocs/about

May 2011 The American Institute of Architects