

## **Moving Right Along: An Employee Move Management Solution Made Quickly, Easily, and Affordably**

Cristine Karasek, CFM  
Marshall Bain

Duke Clinical Research Institute (DCRI), an entity under Duke University's School of Medicine, is an Academic Research Organization. Academic Research Organizations (ARO) perform similar work to that done by Clinical Research Organizations, in that they manage all of the information, data, and processes relating to clinical trials. The work is typically done by teams that work primarily on a single clinical trial, which may last from 1-5 years. At any given time, there are well over 125 different clinical trials being managed. When the clinical trial is finished, the team is disbanded and team members are reassigned to manage information for new projects. The team members are not typically reassigned as a group.

The team members benefit from being located in proximity to each other. As the teams form and reform, relocating the employees quickly and in an organized manner becomes imperative. This function has resulted in a churn rate (the number of individuals moving into or out of a space over a specified period of time) of approximately 12%-16% annually for the last 5 years.

To this end, offices and cubicles are designed to adhere to a strict and simple standard. All cubicles are 8' x 8' (2.4m x 2.4m). All offices are 11' x 10' (3.3m x 3.0m). The furniture is standard also. These simple standards allow us to move office contents efficiently, since seldom is any office furniture relocated. The DCRI Facility Services group is responsible for the overall relocation process.

A regularly scheduled move procedure had been in place since 2002. Move requests had been centralized to a specific day (Friday) and were limited to ten or less employees to be moved at a given time. The Facility Services group contracted with a professional moving and storage company to move the office contents. A system was implemented for the efficient relocation of personal computer-related equipment and telephones. The actual physical relocations went well, as we had identified these components required for a successful employee move.

- Standardized origination and destination information
- Accurate floor plans (maps) with employee location records
- Specialized tools to facilitate efficiency (e.g., moving crates, labels, and appropriate packing materials)
- Prior notice of the move with clearly defined team roles and expectations
- Experienced, well-trained staff

However, as the DCRI grew (two additional buildings and approximately 400 additional employees) the communication regarding the moves became erratic and inconsistent. Managers requesting moves were asked to submit requests via email. The requests would be collected by a Facility Help Desk employee and scheduled for a specific day. Problems occurred regularly. For example, requests for an employee move would be received late, employee move requests were inadvertently left off the master list, employees would change locations without approval, and often people were scheduled to be moved by their manager, without actually being notified of the proposed change!

The existing Move Team recognized that the problem wasn't the move procedure, but a lack of communication regarding the move procedures.

One proposed solution was to purchase Computer Aided Facility Management (CAFM) software with a move module. Financial restraints precluded this solution for the foreseeable future, so we teamed with our in-house Information Technology group with the goal of devising an affordable, web-based, easy-to-use form that could gather the required pertinent information about the proposed move. The form and the

process would be administrated by a Facility Services employee acting as the Move Manager. Access to the form would be limited to a Departmental Move Coordinator serving as a single representative of each department. A list of those employees to be moved would be created and sent with prior notice to all Move Team members, including the technology coordinator, the resource coordinator, and the mover.

We determined that an automated move request form should ask for vital information that could be answered in a standard format:

- Establish vital information needed to complete the move of an employee
- Establish available move options with the use of a pre-set menu to ensure consistency
- Identify the recipients that need to receive the move details

In addition, we needed to choose an appropriate communication method to distribute information and develop a training program so that Move Team members could use the tool easily.

The team identified the information that should be compiled on the Move Form by asking the following questions:

- Who is moving?
- When will they move?
- Where are they located now?
- Where will they be located upon completion of the move?
- What items need to be moved with them and how can they be transported?

Once the required information was gathered, we used the Information Technology group to help us establish in-house system parameters to compile the information to be used on a standard form. The following functions were considered in the program design:

- Convenient drop down fields
- Straightforward character restrictions
- Simple parameter settings
- User-friendly system interface
- Web-based accessibility
- Restrictive access to trained users
- Specific information requirements (who, when, where, what)

In approximately three months, the system was ready for testing. The group found the system worked well. The goal was achieved by gathering pertinent information and translating it into a report that served the needs of the Move Team. We found the following features to be particularly helpful:

- A scheduling feature that allowed quick access to the list of moves over a specified date range
- An "Order Moves" option that allowed sequencing alternatives for efficient workflow
- A "Notes" field that allowed for entry of non-standard requests
- A report function that produced an organized PDF document used to display the move details over a selectable date range

With the design and testing of the system complete, we set out to ensure that the Move Team members were all trained on the new system. We determined that a successful Move Team training program would include the following:

- A description of each component of the move process
- Identification of each Move Team member's role in the move process
- Training on the web-based tool
- Mandatory attendance to a "Refresher" training course to occur twice a year

## **Conclusion**

A well-defined automated move system that is user-friendly with a method for collecting reliable information enables a well-trained Move Team to successfully perform routine moves.