CORPORATE FACILITY MANAGEMENT CASE STUDY:
MANAGING INTRA-OFFICE CHURN IN LIMITED OFFICE SPACE

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CORPORATE FACILITY MANAGEMENT CASE STUDY:
MANAGING INTRA-OFFICE CHURN IN LIMITED OFFICE SPACE

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Thesis

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ABSTRACT

In the interior design profession “Churn” is often thought of as a process by which vacant space, resulting from departing employees, is reconfigured for different employees or potential for alternative usage. This is not always an accurate depiction of the term. By definition, churn, in its expansive sense, is “a measure of the number of individuals or items moving out of a collective over a specific period of time” (Merriam-Webster Dictionary, 2003).

Office layouts are subject to frequent changes, either by creating space for new employees, by reusing space from departing employees moved to a different area, or to accommodate changes in job functions or area of responsibility.

The purpose of this study is to develop a logical and efficient way to manage the movement and condensation of employees in large corporations with limited space. Conducting a case study on Westfield Group, one of Ohio’s most successful companies, give insight on how to efficiently move different departments in limited space with nearly eliminating down time.
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CHAPTER I

INTRODUCTION

In the interior design profession “Churn” is often thought of as a process by which vacant space, resulting from departing employees, is reconfigured for different employees or potential for alternative usage. This is not always an accurate depiction of the term. By definition, churn, in its expansive sense, is “a measure of the number of individuals or items moving out of a collective over a specific period of time” (Merriam-Webster Dictionary, 2003).

Office layouts are subject to frequent changes, either to create space for new employees, to reuse space from departing employees moved to a different area, or to accommodate changes in job functions or area of responsibility. The changes have the potential to drastically impact business by improving operations if done efficiently or by creating obstacles if executed poorly. This procedure is referred to as “intra-office churn,” communicated as the “percentage of the staff moved during a year” (Herman Miller 1997). Intra-office churn is an issue that affects every company, whether it is a Fortune 500 company or a small, individually owned company. Managing intra-office churn is related to competent space planning of office furniture and employees with the foresight to create an area that can be reconfigured for additional employee moves without extending the area.
Statement of Problem

Interior design students prepare for the professional atmosphere, with basic offerings in professional ethics, theory, space planning, programming, color theory, history of the profession, etc. There are two major areas of interior design taught at the college level: residential and commercial design. Residential design involves the process of creating an aesthetically pleasing and fully functional private space. Each designer has his/her own design style that can be beneficial to the client.

Commercial design differs significantly from residential design in a number of ways. Unlike residential design there are numerous codes one must abide by such as: fire and safety codes, ADA codes, and codes for fabric choices, furniture finishes, etc. These particular elements are taught in the classroom.

One aspect of commercial design, however, which is not currently addressed in the classroom is the subject of intra-office churn in limited office space. This subject is generally left to learning on the job and by trial and error, which can be costly to the client/employer. It would be very difficult to teach this subject in the classroom unless there was information on the procedures detailing how one would implement employee moves and manage intra-office churn in limited space.

The literature researched provided considerable insight into the strategies different companies follow in an attempt to manage churn. However, not one source offers a definitive method or process on how to implement employee moves or manage intra-office churn in limited space. The literature found is largely about the planning of atmosphere. The layouts of furniture in the configurations are done in an ideal situation
where the space provided is unlimited. What happens when there is a limited amount of space and additional employees must be incorporated? Most organizations and companies are constrained by finite space and resources, and change must serve to improve productivity of employees, at a minimal expenditure of time and financial resources. There is a distinct lack of information available in the public domain concerning the process with which these design elements may be efficiently and successfully implemented.

The resources found in this research on office planning were studies done by the Buffalo Organization for Social and Technological Innovation (BOSTI) and Steelcase, a system furniture manufacture. BOSTI’s study analyzed the surroundings of the workplace, such as how to implement noise control, how to gauge space needed for certain titles of employees, calculating cost and benefits of all resources, and creative responses to changing trends in the office (Brill, 2001). These points are interesting because these are also considerations that must be addressed when managing intra-office churn in a limited area. Employee moves and managing intra-office churn in limited space were not mentioned by Steelcase or BOSTI as a factor in designing these new workspaces.

BOSTI offers a set of strategies they refer to as “Alternative Officing” or “New Officing.” Their goal is to use “workplaces, technologies, and work processes as an integrated system of enablers, to work smarter wherever work happens” (Brill, 2001). This is the first research found to link office design to productivity and quality of work-life. It is of importance because:

It translates these findings into new facility design concepts which have great capacity for dramatic and positive effects on critical organizational...
outcomes - increased performance, more satisfied employees, more productive teams, and enhanced learning (Brill, 2001).

Brill findings present research-based design guidelines, prototypical office designs, and offer many practical applications for enhancing worker performance in the office. The research quantifies the effects of office design on productivity and quality of working life, and shows how these effects are caused by specific design characteristics. Other aspects covered in the Brill study are:

- Economic analyses of the dollar value of appropriate office design for all job types: managers, professionals and clerical workers.
- Research-based design guidelines for the workspaces for the multi-person workgroup; and for large office areas.
- Aesthetic implications of the guidelines by having America's best design firms develop prototype designs.
- A more effective and more people-oriented design process which emphasizes environmental evaluation, user orientation and training, and user participation in
- The design decision process, affect behaviors, and how those behaviors, in turn, affect the business (Brill, 2010).

In 2005, Steelcase conducted a case study for Horizon Healthcare Services, the oldest and largest health insurer in New Jersey. Steelcase faced a challenge not uncommon in business: how to accommodate more people in less real estate, yet create a workplace that better supports how people work. Donna Celestini, vice president of strategy and development at Steelcase, stated “Simply moving people into smaller
workstations would be a real morale buster. We needed to do something creative with
the work environment” (Steelcase 2012). The importance of Steelcase’s study for
Horizon Healthcare Services was the discovery of more collaborative areas for group
meetings. Allocating private meeting space is more challenging than opening up areas
for collaboration with added tables and chairs. For this reason understanding the type of
work being done is the important factor in knowing how to properly space plan areas in
limited office space.

David Harris, author of several space planning and interior design books, offers
suggestions on how to use the office real estate to its optimal potential in office
environments. Unfortunately, he does not explain how to implement workstations when
dealing with space constrictions. Charts in his book *Planning and Designing the Office
Environment* only explain the percentages of workers’ needs that are to be considered
when building a strategy on reconfigurations to manage intra-office churn (Harris 1991).

*Facilities Management Process*, written by B. Finlayson, does touch on space
planning within a corporate environment. While it does not give a conclusive method or
process on how to go about implementing employee moves or managing intra-office
churn in limited space, it does, in fact, give some insight on different furniture layouts
one can implement in a move. Finlayson says that “instead of adding a new wing to an
existing building; creative ways were developed to accommodate more people in the
same amount of real estate.” Methodology using every inch of the space was
implemented to ensure that there was no wasted space (Finlayson, 1989). In one respect
one could look at this as a method of condensing space. Finlayson describes the manner
in which the space planner went about assessing the real estate and developing a floor
plan to meet the specific departmental needs. This included manipulating areas that were
not quite the standard workspace, such as awkward corner spaces or space near windows,
and turning it into a usable zone.

For example, not all facilities have perfectly rectangular layouts. Columns get in the
way, heating elements protrude from the wall, corners have columns jutting out of the
junctions of walls, etc. When developing new techniques in planning a major move for
employees, one should look back at methods that have proven themselves valuable. For
instance, a method such as separating a standard workstation to correspond to the
allocated space is where creativity and flexibility in planning a space becomes crucial.

Managing intra-office churn in fixed real estate is paramount in reducing downtime,
which in turn negatively impacts productivity. Studies such as this one conducted on
Westfield Group Insurance brought focus to the management of intra office-churn in
limited space. When moving employees, one must consider the furnishings and
equipment that supports each department’s work. Do employees spend more time in
collaboration or do they spend most of the work day at their desk in front of a computer?
Placing them in the right environment is ultimately the goal of the design project
manager. Just moving people into a space that accommodates the number of employees
will not enhance productivity for future growth if employee functions are not understood
in the initial planning.

The formation of effective space planning strategies can be greatly enhanced by
utilizing a standardized process with which to evaluate all variables of the job. Space
planning strategy is all about process. Technology plays an integral part in shaping how facility planners might reassess the options available prior to costly expenditures of time and materials. Technologies such as a laptop computer, cordless accessories, and a Wi-Fi system opposed to a network hook up are tools that require less space and eliminate the need for additional considerations. However, the rate of intra-office churn in limited space demands two additional types of consideration. One focuses on new ways of accomplishing the work, and the other strengthens the process. The processes in which planners engage vary from team to team and from department to department. Implementing a systemic process for the incorporation of these churn elements can offer a company a competitive advantage in cost reduction of employee moves.

While current research serves to explore the different elements of managing inter-office churn, there is a lack of accepted processes in incorporating these elements into a functional and cost effective transition.

Diverse Management Styles

This is where the problem lies: each individual company uses different strategies for how they go about implementing the movement of employees. One must be consistent in the processes that are utilized to be successful in the implementation of employee moves. Thus far in my career as an interior designer, I have worked with three different design firms, ranging from a small, individually owned firm to a large corporation. The similarities in these firms were that each dealt with managing intra-office churn whether it was in-house or a client’s facility. What separated these firms
was the way they approached a project in planning and execution. Two firms went about a project without a standard set of rules, treating each job differently, which left opportunity for mistakes and logistical inconsistencies to develop. The third firm went about each and every project using the same set standard; in every instance each job was evaluated with established guidelines to aid in eliminating mistakes. Identical considerations were made in every job. Without a set criterion to follow, which the first two firms did not have, most tasks were done out of order, mistakes were made, resulting in hours of downtime for the client, translating into lost productivity and ultimately lost revenue. Specific space planning processes are needed to successfully complete a job with the least amount of mistakes and employee downtime.

Intra-office churn is reported differently

Intra-office churn occurs differently in companies and is not always reported in a consistent manner, if reported at all. The only way one can evaluate intra-office churn is to review previous projects, analyze and document the number of existing employees, additional employees, equipment utilized, space allotment, time frame, and employee downtime. Organizations affiliated with the interior design profession such as ASID (American Society of Interior Designers), IIDA (International Interior Designer Association), NK&BA (National Kitchen & Bath Association), NCIDQ (National Council of Interior Designer Qualification), IDEC (Interior Design Educators Council, Inc.) or IDS (Interior Design Society) are not qualified to and do not collect data from corporations. There is not an organization that collects data from companies on the
amount of intra-office churn that is produced in a given year. Most data remains in-house if it is recorded at all. One organization that is concerned with office efficiency and simplifying management practices is The International Facility Management Association (IFMA). IFMA, however, does not offer collection of data from corporations; it provides research on issues facing facility planners.

IFMA is a “professional association to guide and develop facility management professionals by providing services, products, resources and opportunities” (IFMA 2010). IFMA conducts a variety of research programs. From industry surveys to forecasting to benchmarking reports, IFMA’s research department draws on the practices of facility management professionals, covering topics vital to the day-to-day operations of facility professionals and the built environment in general. IFMA’s research reports have “focused on space and project management, operations and maintenance, distributed work, facility costs, security, sustainability and energy efficiency” (IFMA, 2010).

IFMA’s purpose is to further enhance the productivity of all corporate institutions. Once again, IFMA is not qualified and does not collect data from corporations on intra-office churn. Nor does it suggest a standardized process in which managing intra-office churn can be achieved.

It appears that churn in limited space is not a priority issue among interior designers, though it is important to owners. Literature discovered in the review expresses the importance of managing intra-office churn; nonetheless, it lacks process information suggesting ways to go about alleviating inherent problems. “The Impact of Churn: Managing Workplace Assets” by Herman Miller covers space planning as a theoretical
framework for managing people in the work place. Facility Performance Group, a research group associated with IFMA, affirms that there are several different strategies in dealing with intra-office churn depending upon which source or level of intra-office churn a company is facing. These strategies include:

- Facility planning for forecasting long-range and near term churn;
- Universal planning and free address (unassigned) offices for ongoing churn; fixed spine walls to reduce the cost associated with technology churn; flexible furnishing that allow facilities to be adopted easily to meet changing requirements (IFMA 1997).

Still, data of intra-office churn in limited space is not reported or documented and makes it different to develop a process to control the ever-growing issue in the corporate arena.

Importance of Study

Well-managed facilities are invaluable assets that perform and add value to the companies that own, manage, and/or occupy them. More than a theoretical concept, a “facility's role in promoting workers’ well-being demands careful coordination of base building systems and workstation designs” (Touliatos, 1988). The book Research Methods in Human Ecology/Home Economics (Touliatos, 1988) expresses concern about the proper application of employees’ workstation design. But again, it does not mention what happens when that employee must relocate to another area in the facility. How are the workstations moved and reconfigured in a timely and methodical manner to promote workers’ well-being and consistent productivity? What is necessary is to apply a deliberate and systematic process.
An article published by Facility Performance Group on space and project management describes the importance of managing churn in the workplace (IFMA, 2010). Various concepts are explained to guide a project manager in management of churn. But once again, a process in managing intra-office churn in a limited space is not discussed.

If companies had a resource that was proven to eliminate most downtime in intra-office churn movement of employees, it would eradicate costly mistakes. The churn process might include involving employees before the information is collected from the department contact, and also preparing layouts of system furniture to be purchased before the in-house stock is checked for availability. Herman Miller reaffirms this in *The Impact of Churn: Managing Assets*, “since the beginning of white-collar work, organizations have moved their people and furnishings around within facilities and from one location to another” (Herman Miller, 2003). If this is so, why hasn’t there been a system developed to move employees in the most efficient manner? Here, a tested and proven strategy would be invaluable to the corporate world to increase efficiencies in the workplace.

Purpose of Study

This research documents the management of intra-office churn in the limited space of one large, successful corporation, Westfield Group Insurance Company.
(Westfield Group). In its 172 year existence Westfield Group has developed a very rich history from infancy to its present-day international holdings. Westfield has been in business since 1840. The home office is located at Westfield Center, Ohio (See figure 1).

Westfield Group was chosen for this case study because of the method and strategies it implements when moving employees to different areas within its facilities. As Jean Miller suggested, “Each project is treated in the same methodical way; logically thought through and systematically implemented” (Miller, 2005).

Westfield Group’s space requirements have been growing continuously since the first addition was added to the 1840 headquarters. In 1866 the board of director’s authorized the construction of a 40’ by 40’ brick building to encompass the older office building. Because of growth, this has required assessments on an on-going basis to evaluate existing space so that employees may be re-arranged to accommodate additional workspaces (Condon, 1985). Hence, workspace size becomes critical. Steelcase believes that “The growth in any organization, unless properly channeled and managed, creates potential opportunity for self-destruction” (Steelcase, 2012).

Westfield Group Insurance, at the time of the study, was going through a personnel growth surge. Because of the increased policy holders, whether individual or corporate, employment numbers were increasing, thus requiring new workstations to be provided in the same amount of real estate. This case study of Westfield Group examines the strategies it implemented in each move of employees or reconfigurations of furniture. This includes moves that constitute intra-office churn occurring at various levels of complexity.
Westfield Group defines three kinds of moves: *Box Moves* where employees move to existing workspaces, involving relocating files and supplies, not furniture or power and data cabling and *Furniture Moves* which represent a higher level of complexity, with reconfiguration of existing furniture or addition of new furnishings, and minimal changes to cabling. The most multifaceted classification is *Construction Moves* which include new permanent walls, additional wiring for power and data, as well as new or additional furnishings.

This case study documents Westfield Group’s current procedures that ensure quick and efficient movement of employees to minimize downtime. Departmental processes are streamlined and logical, adding to the efficiency of work while minimizing inconveniences and frustration of employees.
The techniques and methodology in use at Westfield Group were evaluated in an attempt to manage intra-office churn in an ever-increasing employee base within finite space and with suggestions for improved efficiency. Westfield Group agreed to participate in this case study of their Workplace Design Department. The Workplace Design Department is integral to facility management as it is responsible for following the progress of employee moves and documenting data required for future use. The home office houses approximately 2500 employees in 350,000 square feet. Westfield Group has service offices in several states as well; in total the Workplace Design Department is responsible for over a million square feet of office space and approximately four thousand employees. Selection of projects for this study in the home office depended on Westfield Group’s schedules.

The research findings of this study were examined in order to develop a “spaceplanning guideline” that can be used to formulate a space-plan for limited office space. This “spaceplanning guideline” will be a directive for analysis of existing space and a framework with which to implement an efficient move. This guide will also provide a model for corporate facility planners, interior designers, and office furniture manufacturers to follow when analyzing and evaluating current methods of managing intra-office churn within limited space.

A sector that this study will benefit is the system furniture manufacturer. Manufacturers research how they can improve their products and continue to provide ergonomically correct workstations within the same square footage without hindering the users’ physically or mentally. Top U.S. office furniture manufacturers include Kimball,
Herman Miller, Steelcase, Knoll, and Haworth. These manufacturers constantly conduct research on the way companies work and the proper space allocation for each individual personnel classification, especially as space constraints exist because of construction and real estate costs.

Westfield Group’s Considerations in Managing Intra-Office Churn

This paper will evaluate different features of successfully executing an employee move in limited office space. This will analyze Westfield’s guideline process that can be used to streamline and improve the management of churn projects. It covers how to handle unforeseen issues, how to evaluate and document aspects of the process, as well as opportunities for improvement, and provides a standardized process for the benefit of companies facing the common task of reassigning employees to different areas in the facility.

The study defines the respective Workplace Design Department responsibilities: what each is accountable for; how many employees are in the department; how many times the department has moved in the past year; and how many redesigns have occurred without reconfiguring the entire department, for example, by relocating employees’ workstations within existing department perimeters. The following are the considerations in planning an employee move at Westfield Group facilities.

Business needs - Office layout designs should provide furnishings suitable for the business needs of the organization. For example: call centers undertake their business ‘on screen’ and require small desk areas per staff member, minimum document storage,
and may have limited requirements for photocopying facilities and printing. In contrast, departments handling paper based documentation will require larger desks for the staff, storage for records, archive facilities, photocopying and printing facilities close at hand.

Accommodation standards – Workplace Design Department company policy governs minimum furniture standards for each staff grade. At Westfield Group accommodations adhere to classifications: Clerical, Professional, Underwriter, Modified Manager, and Manager. Administration staff may work in open plan stations whereas managers may have individual offices. In 2004, Westfield Group changed the assistant vice-president station into private offices with full-height demountable walls. Offices were added as a way to provide privacy for the executives in the open office area and to relieve the strain on conference rooms. The hope was that meetings could be held in executives’ offices instead on monopolizing conference rooms.

Partitions - Open plan layouts divide space into smaller areas for managers, meetings, etc. The designer has to account for the several necessary systems including: voice and data cabling, ventilation, heating/cooling zones, noise/acoustics, and other building services.

Services - Each desk may require a telephone and computer. In large offices the power and data cables may be run under a raised floor to the desk. Another alternative is to use power poles to bring services from the ceiling which assist space planning of desks away from perimeter walls.

Space planning – Collaborative teams usually provide the best option for inter-communication and/or supervision, and are a key factor in office layout design. Where
space is at a premium, however, it may be difficult to accommodate a workgroup in a given area, and the solution often involves making space by moving others. Moves of this type may be complex and disruptive as there is often a chain of events involved.

Planning tools - Modern office layouts are frequently planned using CAD (Computer-aided design) drawing software. The CAD program is a time saving technology that tremendously reduces drawing time compared to drafting by hand.

Staff welfare facilities - Office staff require access to basic welfare facilities such as toilets and drinking water. Consideration may also be given to vending, catering or a place where staff can make a beverage and take a break from their desk.

As previously stated, many organizations’ office layouts are subject to frequent changes. There is a certain process that is followed in each space planning assignment at Westfield Group regardless of size. According to Herman Miller, there are three primary sources or levels of intra-office churn within a corporate facility:

1. Companywide restructuring, as a result of mergers, downsizing, and total quality management-based consolidations
2. Ongoing employee moves (co-locations) to assure greater efficiencies within and between operations and departments.
3. Ongoing formation and operation of project teams (Herman Miller, 2003).

Methods Used In the Case Study of Westfield Group

By definition “Methodology can properly refer to the theoretical analysis of the methods appropriate to a field of study or to the body of methods and principles
particular to a branch of knowledge” (Free Dictionary, 2013). Methodology is usually a system for solving a problem, with specific components such as phases, tasks, methods, techniques, and tools used in a particular discipline.

The method used in this case study will be:

1. Observe, record, and document the data from each of the three different moves at Westfield Group.
2. Analyze how the actual moves compared with Westfield Groups’ model.
3. Record the timeline for each stage of the three different types of moves, as a base line for future moves.

Westfield Group Intra-Office Churn Process

Jean Miller, leader of the Workplace Design Department at Westfield Group, notes that the thought process for all of Westfield Group’s projects is exactly the same. She states, “This process makes sure that every department that needs to be involved in the project is kept informed. Communication is vital when relocating an entire department, whether it is large or small” (Miller, 2005). Westfield Groups’ set of standards, entitled “Thought Process for all Projects” (Miller, 2005) must be followed and not deviated from. They are as follows:

1. Review scope of project – Collect information from project contact
   • Ask questions of main contact to fill any gaps and to determine level of importance compared to other work. Is this a priority based on a specific business need or addition to staff?
• Determine whether other departments are involved so they can be contacted as needed (i.e. – disruption, need to take space from them or move any of their furniture or equipment items).

2. Assess availability of space to meet the needs requested.
   • If a reconfiguration is involved, do a quick review to determine whether anything will need to be ordered to help determine when the project will be implemented to give requestor an idea of timeframe to completion. If it is a rush project, this gives an opportunity to get items on order sooner than later. If it is not a rush, ordering would wait until drawings, etc. are completed.

3. Contact surrounding departments to discuss availability of space and/or how they may be affected.

4. Complete drawings (if applicable), depending on size of reconfiguration.
   • Complete new layout options using AutoCAD (depending on project size, complete either block - plan or show furniture/panels).
   • Transmit option(s) to contact via email.
   • Meet with contact again as needed.
   • Complete additional options or if approved, finalize drawing.
   • Request new personnel seating chart from contact.
   • Walk through area to note current seating chart, printer location, etc.

5. Reconcile the system panels and furniture (existing drawing to new drawing layout) to develop a pull list. Give to Maintenance to complete.
• Check in-house stock for panels/furniture coordinating the use with other projects in planning.

• Request quote for missing items from Furniture Dealer salesperson

• Order furniture

6. Determine the approximate implementation date based on new furniture arriving

• For large projects, develop phasing for reconfiguration. One must confirm that size of phase will accommodate temporary seating for employees, as needed.

• If it is a large project that requires phasing, develop the teardown and rebuild phases.

• Schedule project (with Furniture Dealer if they are handling the implementation)

• Transmit the new and existing drawings with the applicable phasing noted on it to get available labor dates from project manager. Transmit Furniture Dealer the AutoCAD version and Portable Document Format (PDFs) with the phasing if not all on AutoCAD. PDF is a file format created by Adobe Systems, Inc. that enables sharing of files with others who do not have the same software.

Make sure projects are not overbooked by phasing or scheduling conflicts.

7. Reconfigure the panels and furniture. Notify IT Department (Information Technology) for de-cabling and cabling of workstation panels. The network cable runs through the panels of each workstation. In order to separate the panels for reconfiguration the cables must be removed. Once the panels are reconfigured in a new layout the network cables must be installed before the project can move forward. Inform leader of Maintenance for power pole and base power-in changes
8. Complete “To/From” move spreadsheets to detail the moving of employees into final or temporary seating for each phase of the project (if it is a short list of employees, it can be included in the body of the work order and not on a separate spreadsheet.)

9. Complete work orders for all other departments involved in the employee moves as applicable

   • Notify IT, Maintenance, and all employees listed on the move spreadsheet (and managers) to schedule the reconfiguration with them.
   
   • Notifications include dates, tasks for IT and Maintenance, and packing instructions for employees.

10. Answer questions, make adjustments and update schedule to all involved as needed.

11. Generate a punch list and submit to appropriate parties ensuring follow up. A punch list is generally a list of tasks or "to-do" items that must be completed for a project to be fulfilled. Such as a keyboard tray that was not installed, additional shelving that is missing, or a privacy panel that was overlooked, etc. (Miller, 2005).

Evaluate Issues

   It has been my experience in projects large or small that in spite of meticulous planning, unforeseen delays, and problems do occur. These issues will be discussed in each example of the types of moves Westfield Group encounters. As noted on page 14, there are three kinds of moves: Box Moves where employees move to existing workspaces, Furniture Moves reconfiguration of existing furniture or addition of new furnishings, and Construction Moves which is a multifaceted project.
Potential for problems such as late delivery, computer glitches, miscommunication, etc., occur in any process. These cannot be planned and must be addressed in a consistent and thorough manner to continue the project smoothly. How one goes about finding a solution to unforeseen matters will be the difference between a successful project and one that is unsuccessful.
CHAPTER II

WESTFIELD GROUP’S FACILITIES

Westfield Group Insurance Company’s headquarters’ is a late eighteenth century Georgian architecture design (refer to Figure 1, page 13). It has bulbous chimneys throughout, four stories using strict symmetry arrangements, panel front door centered, topped with rectangular windows and capped with an elaborate crown/entablature supported by decorative pilasters, a cornice embellished with decorative moldings referred to as dentil work, a brick façade, and well-maintained grounds.

The interior is a modernized facility. Westfield Group strives to keep the interior of facilities updated with the newest trends in office design, and to promote employee wellness by supplying the most up-to-date features in workstation technology. The Workplace Design Department is responsible for designing and maintaining all work areas. For example, walls need to be painted periodically to stay looking fresh, and carpets replaced intermittently to avoid the appearance of wear, etc. The Design Department makes all the arrangements in keeping up with aging finishes. More importantly, it is in charge of space planning, facility designing, space assessments, scheduling employee moves, implementing employee moves and departmental reconfigurations.
Westfield’s the home office is comprised of approximately 350,000 sq. ft. of useable space and employs all in the same office approximately 2000 people (see Figure 2). Westfield Group’s space requirements have been growing continuously since the first 40’ x 40’ addition was added to the 1856 headquarters. Because of ongoing growth, the Workplace Design Department regularly makes required space assessments to evaluate the existing space can be re-arranged to accommodate new employees and work spaces. A critical issue here is the work space size. As Steelcase noted, “The growth in any organization, unless properly channeled and managed, creates potential opportunity for self-destruction” (Steelcase, 2012).

Westfield Group’s Standard Workstations

Every company has specific workstation plans allocated for different levels in the company. Steelcase is the systems furniture manufacturer that supplies Westfield Group with equipment. Steelcase is one of the largest manufacturers of system furniture in the world, and is known for their systems modularity and the ability to interchange between workstation layouts. According to Steelcase’s web site, “For 100 years, Steelcase has been bringing human insight to business by studying how people work, wherever they work. Those insights can help organizations achieve a higher level of performance, by creating places that unlock the promise of their people” (Steelcase, 2013).

Westfield Group’s Workplace Design Department implements five different workstation layouts in any given project. A panel system divides each workstation. The panels surrounding the office furniture involve moveable wall components. The dimensions of these panels are designated first in width and second in height. The width
Figure 2. Main Floor Plan. The entire floor plan of Westfield Group Insurance facilities.
of the panel will coincide with the width of the piece of furniture being used in conjunction with it, but the height of the panel used can differ depending on what effect is desired for the interior area.

For example, if more privacy and noise control is desired, a higher panel would be used. If an area is used for collaboration between employees, a shorter panel would be implemented.

Westfield Group Insurance Company workstations are determined by the level of importance in the company. Each level of importance or job title classification has a given panel configuration.

Workstation levels and square footage are as follows:

1. Clerical (38 Sq. Ft.)
2. Professional (44 Sq. Ft.)
3. Underwriter (72 Sq. Ft.)
4. Modified Manager (73 Sq. Ft.)
5. Manager (94 Sq. Ft.)

Clerical Workstations

Accommodates employees who mainly use computers and do not generate much paper (see Figure 3). This workstation is assigned to departments which use word processing software, assist in the flow of office communications through emails, and telephone calls, and provide basic assistant support to upper level supervisors, etc. It is composed of 38 square feet of space, 23 square feet of work surface, 7.3 cubic feet of overhead storage, and approximately 16.6 cubic feet of file storage. Panels are noted as
Figure 3. Clerical Workstation. This is the smallest workstation used by Westfield Group Workplace Design Department. It accommodates employees who mainly use computers and do not generate much paper.
30”, 35”, and 45” wide by 65” high. Though small in size, this workstation affords enough room for the employee to do his/her job efficiently. This space provides ample storage space for work-related files and personal items.

Professional Workstation

Is built for employees who generate more paper and need more storage (see Figure 4). It is composed of 44 square feet of space, 24.62 square feet of surface space, 8.0 cubic feet of overhead storage, and approximately 16.6 cubic feet of file storage. Panels are either 30” or 45” wide and 65” high. This workstation affords enough room for each employee to do the job efficiently. This space also provides ample storage space for work-related files and personal items.

Underwriter Workstation

Is built for employees who generate more paper copies and need more storage space as well as extra real estate for collaboration (see Figure 5). An insurance underwriter is responsible for determining the likelihood of an event with regard to providing insurance. The underwriter not only determines whether or not to offer insurance, but also at what rate that insurance is most likely to be profitable. An insurance underwriter uses historical data as well as situation-specific data to make the determination. Underwriters rely on computer programs that assist with calculating risk. The Underwriter workstation is comprised of 55 square feet of space, 34 square feet of surface space, 7.3 cubic feet of overhead storage, approximately 16.6 cubic feet of file storage. Panels are 25”, 30”, 35”, or 45” wide and 65” high. The workstation affords
Figure 4. Professional Workstation. This is built for employees who generate more paper and the need for more storage is necessary.
Figure 5. Underwriter Workstation. It is built for employees that generate more paper copies and the need for more storage is necessary and the need of extra real estate for collaboration is needed as well.
enough room for the employee to do the job efficiently. This space also provides ample storage space for work-related files and personal items.

**Modified Manager Workstation**

Is built for employees who are in leadership positions. These employees are co-responsible for an entire department’s work and they collaborate with the manager of the department. The need here is for more file storage, and extra space for necessary collaboration (see Figure 6). This station is comprised of 73 square feet of real estate, 34 square feet of surface space, 6.8 cubic feet of overhead storage, approximately 36.3 cubic feet of file storage, and space for a visitors’ chair. Panels are 25”, 30”, 36”, 45”, and 60” wide and 65” high. This workstation affords enough room for the employee to do the job efficiently. This space also provides ample storage space for work-related files and personal items.

**Manager Workstation**

Is built for employees who are in leadership positions. These employees are responsible for an entire department’s work and need to collaborate with the employees of the department. The demand is for more file storage, and extra space is essential for collaboration (see Figure 7). The station is composed of 94 square feet of space, 34 square feet of surface space, 6.8 cubic feet of overhead storage, approximately 36.3 cubic feet of file storage, and space for two visitors’ chairs. Panels are 25”, 30”, 36”, 45”, and 60” wide and 65” high. This workstation affords enough room for the employee to do the
Figure 6. Modified Manager Workstation. It is built for employees who are in leadership positions.
Figure 7. Manager Workstation. It is built for employees who are in management positions. These employees are responsible for an entire department’s work and need to collaborate with the employees of the department.
job efficiently. It also provides ample storage space for work-related files and personal items, and there is enough space to hold strategy meetings with small groups.

Decision Matrix

The Decision Matrix is the tool to help decide between multiple options by comparing them to the needs of the project. A Decision Matrix can help the evaluator effectively decide which option is needed in the respective project. The Decision Matrix that will be used in this case study (see Table 1) is the list of priority options in any given Westfield Group project. It includes which department will be involved with the current project, what sort of paperwork needs to be filed, and how much preparation needs to be accomplished before the project can begin. Shown below is a comparison of the three moves that are under review.

Decision Matrix Clarification

The Decision Matrix compares all types of moves under review. In order to better understand the Decision Matrix each criterion is clarified by the following Workplace Design Department standards:

- **Timeline**: Refers to the amount of time estimated to complete the project. A schedule of activities or events; a timetable. The first move to the project completion is taken into consideration on a visual timeline.

- **Field Measurement**: A field measure ensures that each element or component will fit as intended within the space, and improves the overall accuracy of the installation. The field measure on site process also reduces problems and conflicts.
Table 1. Decision Matrix. A Decision Matrix is a tool to help decide between multiple options by scoring them against different criteria.

<table>
<thead>
<tr>
<th></th>
<th>Box Move</th>
<th>Furniture Move</th>
<th>Construction Move</th>
</tr>
</thead>
<tbody>
<tr>
<td>Timeline</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Field Measurement</td>
<td></td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Space Assessment</td>
<td></td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Equipment Inventory</td>
<td></td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Box Delivery</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Phase Evaluation</td>
<td></td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Maintenance</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>IT/HELP Desk</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Electrician</td>
<td></td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Furniture Dealer</td>
<td></td>
<td></td>
<td>●</td>
</tr>
<tr>
<td>Furniture Installers</td>
<td></td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Cabling Technicians</td>
<td></td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Work Orders</td>
<td></td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Move Orders</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>CAD Drawings</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
</tbody>
</table>
between various parts of a project, and alerts project managers to potential issues early on in the schedule so they can take steps to remedy these problems.

- **Space Assessment:** The next step in employee relocation is to conduct a detailed assessment of existing office space. This establishes the space and tenancy requirements before the planning of the proposed workstations. Space assessment involves finding the amount of area available to work within. This is the process where calculations of the usable square footage of the targeted space are made. Also, one must conduct a detailed review of the existing tenancy, departmental structure, staff requirements, and number of offices, meeting rooms, workstations, and projected growth requirements. This can be done by using CAD software evaluating the building floor plan to find the exact square footage. The only time a space assessment is not warranted is in a Box Move. This is because no additional space is required for workstations. Only the existing workstations will be used.

- **Equipment Inventory:** Each piece of equipment must be accounted for in every project. For example, all filing cabinets, copy machines, fax machines, desk, work counter, office chairs, printers, etc. need to be documented and provided for in the new configuration of a targeted area.

- **Box Delivery:** The Maintenance Department is responsible for delivering packing boxes to all employees who are involved with the move. These boxes are for the items one keeps in the workstation, such as company property and personal items to be moved.
• Phase Evaluation: The Workplace Design Department divides up the project area into phases: installers are notified as to which areas and the dates they will be needed. Each project is broken up into phases. These phases tell the workers which area of the department they will be working in first, and where they progress from day to day.

• Maintenance, IT/Help Desk: are two Westfield Group departments involved with every completed project. The HELP desks are people who coordinate the IT techs.

• Electrician, Furniture Dealer, Furniture Installers, and Cabling Technicians: these other departments are involved with selected projects.

• Work Orders: Spreadsheets are compiled to notify all personnel of their responsibilities during the project. These include date/day when the service is needed, time allowed for each aspect, and any other special orders/comments concerning the current project.

• Move Orders: These particular orders are for moving equipment and employees. This is information explaining to the employee when the move is going to take place, the date/day/time when each individual employee will move, and instructions about when to pack belongings. Also, the move order is sent to the respective departments which are involved with the move. Such as Maintenance, which will move the employees to the proper area, IT will disconnect/connect any network cabling and get the computer system up and running.
• CAD Drawings: Computer Aided Drawing (CAD) is the use of computer systems to assist in the creation, modification, analysis, or optimization of a design. CAD software is used to increase the productivity of the designer, improve the quality and accuracy of design, improve communications through documentation, and to create a database for manufacturing (USDL, 2014). Drawings of the workstation layouts are compiled of the targeted area. This assists in clarifying directives for the departments involved with the move. Having a visual of the move/work orders helps when the written orders come into question.

Each project included in this case study was approved by Westfield Group. All three projects are actual projects that were observed in this case study. Three different types of projects will be evaluated in this case study for the diversity of sizes of areas. A visual will be provided to better explain the designing process. The areas that will be evaluated are as follows:

1. Area 2-04 Small Business Accounts – *Box Move*

2. Area 2-08 Hospitality Operations – *Furniture Move*

3. Area 1-08, 1-09, 1-10 Claims – *Construction Move*
CHAPTER III

AREA 2-04 SMALL BUSINESS ACCOUNTS – BOX MOVE

Introduction

Every insurance company has a Small Business Accounts Department. The Small Business Accounts Department in Westfield Group specializes in writing insurance policies for smaller companies. Small businesses are privately owned corporations, partnerships, or sole proprietorships. Typical examples of small businesses include: convenience stores, bakeries, delicatessens, restaurants, photographers, small-scale manufacturers, and online businesses, such as web design and programming.

Westfield Group offers a wide range of protection benefits for insuring small business properties. There are 53 employees at the home office and approximately 12 employees in the Lancaster, Pennsylvania, office. In Westfield Group’s Small Business Accounts Department teams are dedicated to a region or state where the company does business. For example, Westfield Group has policy holders in Kentucky; a team of 4-6 employees in the Small Business Accounts Department in the home office are dedicated to this region. Basically, within Westfield Group Small Business Accounts, the different levels of responsibilities are Clerical, Underwriters, and Managers (Miller, 2005).
Refer again to Figures 3, 5, 7; these are the workstations of each level of responsibility in the department of Small Business Accounts. Of the 53 employees who make up the Small Business Accounts, 36 employees will be involved in the Box Move.

Scope of Project

The scope of this move is to condense employees in the region of their responsibilities. This project is referred to as a Box Move, where employees move to existing workspaces within the department, involving relocating files and supplies. The reason for this Box Move is that as time goes on employees’ status changes as to the region they oversee. Teams change so they must be relocated to maintain the team atmosphere. It is imperative that employees in a certain region be seated in workstations by their respective colleagues of the same region of responsibility. The area of Small Business Accounts (see Figure 8) is indicated in the floor plan of Westfield Group facilities.

As noted, a Box Move is different from a furniture and construction move. A Box Move does not require the entire set of standards discussed previously and a space assessment is not necessary. Standards 4, 5, & 6 apply to this move. The complete set of standards was listed beginning on page 19 of this case study in Westfield Group’s Intra-Office Churn Process.

The limited standards included in a Box Move are as follows:

1. Review scope of project – collect information from project contact.
Figure 8. Small Business Accounts Location. In the shaded area encompasses the Small Business Accounts department.
• Ask questions of main contact to fill any gaps and to determine level of importance compared to other work. Is this a priority based on a specific business need or addition to staff?

• Determine whether other departments are involved so they can be contacted as needed (i.e. – disruption, need to take space from them or move any of their furniture or equipment items).

4. Complete drawings (if applicable), depending on size of reconfiguration.

• Complete new layout options using AutoCAD (depending on project size, complete either block - plan or show furniture/panels).

• Transmit option(s) to contact via email.

• Meet with contact again as needed.

• Complete additional options, or if approved, finalize drawing.

• Request new personnel seating chart from contact.

• Walk through area to note current seating chart, printer location, etc.

8. Complete “To/From” move spreadsheets to detail the moving of employees into final or temporary seating for each phase of the project (if it is a short list of employees, it can be included in the body of the work order and not on a separate spreadsheet.)

9. Complete work orders for all other departments involved in the employee moves as applicable.

• Notify IT, Maintenance, and all employees listed on the move spreadsheet (and managers) to schedule the reconfiguration with them.

• Notifications include dates, tasks for IT and Maintenance, and packing instructions for employees.
10. Answer questions, make adjustments and update schedule to all involved as needed.

11. Generate a punch list of tasks or "to-do" items that must be completed for a project to be fulfilled and submit it to appropriate parties ensuring follow up (Miller, 2005).

In order to begin the *Box Move* process, a preliminary existing and relocated employee seating chart must be submitted to the Workplace Design Department by the supervisor of the department requesting the move. When implementing a *Box Move*, the designer works closely with the department supervisor or contact person to review the scope of the project. Once the Workplace Design Department receives the seating plan, a worksheet is compiled by the designer of the existing layout and relocation of the employees (see Figure 9). As previously noted for all moves, this information tells the designer where the employees are currently seated and where the employees are to be moved (the supervisor of the department determines where each employee is moved). In this Box Move there are two other departments involved: IT and Maintenance. These two departments work closely with the Workplace Design Department throughout a *Box Move*.

**Departments involved with Project**

As indicated in the Decision Matrix (see Table 1 on page 37) the IT and Maintenance Departments are the only two departments involved with a *Box Move*. In order for the move to begin, an assessment of available unoccupied workstations must be accounted for. These unoccupied workstations will be used as temporary workstations for a few employees. Two sets of seating chart drawings are compiled.
Figure 9. Small Business Accounts Workstations. Since the area is too large to give a good illustration of the workstations, an example of the workstations is designated by the dark rectangle. Inside the dark rectangle is a rectangle with broken lines. These are the workstations this case study will discuss.
Figure 10. Small Business Accounts Existing Employee Seating Plan. These are the workstations located in the rectangle with the broken line in Figure 9.
One is the existing location of the employees (see Figure 10) and the second one is the new seating arrangements of the department (see Figure 11). The existing seating chart is marked with an “E” to indicate where the particular employee is located in the existing layout. The new seating chart is marked with a number indicating where the employee will be relocated. A spreadsheet is also compiled (see Table 2).

Shown in Figure 9 is the existing area of the Small Business Accounts at Westfield Group. Each workstation is marked with a number to be able to make the move operate efficiently. The workstation is marked with the number of the department, workstation number, and an “E” before the workstation number indicating it is an existing employee position. Where the employee is to be relocated is indicated with the number of the department and a number (refer to Table 2). Compiling seating charts from existing positions to relocated positions is the most time consuming part of any Box Move project.

The IT Department is responsible for disconnecting the employee’s computer system, phone, and any other electronic equipment in the existing workstation. IT will move the equipment to the new workstation and reconnect it to the network. The Maintenance Department is responsible for moving all the employee’s possessions to the new workstation. Maintenance is also responsible for installing any hardware that may be needed in the new workstation. For example, a keyboard tray is installed under the work surface, a stand-up work surface, and possibly an additional panel or overhead storage bin.
Figure 11. Small Business Accounts New Employee Seating Plan. These are the workstations located in the rectangle with the broken lines in Figure 10.
Table 2. Employee Movement Spreadsheet. Small Business Accounts moving spreadsheet is an itemized spreadsheet informing all employees of their scheduled moves. This spreadsheet keeps all employees abreast of all movements and changes in the ongoing project. Small Business Accounts Department chart of employees existing seating and where they were assigned to move. This is an example of a completed spreadsheet that employees would receive in an actual move. Since the entire floor plan could not be shown because of size restrictions of this paper only a few moves can be displayed.

<table>
<thead>
<tr>
<th>DEPARTMENT NAME</th>
<th>MOVES</th>
<th>DATE and approximate time of move</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>NAME</td>
<td>FROM</td>
</tr>
<tr>
<td>Small Business Accounts</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee #1</td>
<td>204E-10</td>
<td>204-18</td>
</tr>
<tr>
<td>Employee #2</td>
<td>204E-11</td>
<td>204-19</td>
</tr>
<tr>
<td>Employee #3</td>
<td>204E-12</td>
<td>204-20</td>
</tr>
<tr>
<td>Employee #4</td>
<td>204E-13</td>
<td>204-21</td>
</tr>
<tr>
<td>Employee #5</td>
<td>204E-14</td>
<td>204-22</td>
</tr>
<tr>
<td>Employee #6</td>
<td>204E-15</td>
<td>204-23</td>
</tr>
<tr>
<td>Employee #7</td>
<td>204E-16</td>
<td>204-24</td>
</tr>
<tr>
<td>Employee #8</td>
<td>204E-17</td>
<td>204-25</td>
</tr>
<tr>
<td>Employee #9</td>
<td>204E-18</td>
<td>204-26</td>
</tr>
<tr>
<td>Employee #10</td>
<td>204E-19</td>
<td>204-27</td>
</tr>
<tr>
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</tr>
<tr>
<td>Employee #18</td>
<td>204E-27</td>
<td>204-10</td>
</tr>
</tbody>
</table>
Seating Plans

Relocating employees to a temporary work area allows facility planners to allocate newly emptied workstations in the targeted area for employees being transferred to a new workstation. For example, Figure 10 displays underwriter workstations E10 – E14 and E23 - E27 which comprise one section in the Small Business Accounts department move. Existing employees in workstations E10 – E14 are to be moved to temporary workstations in another area where unoccupied workstations are available. This opens up the four workstations to begin the relocating process for permanent employee workstations. For example, workstations E23 – E27 are relocated into workstations 10 – 14 and this leaves E23– E27 workstations open for new occupants in workstations 15 – 19 as shown on Table 2 to move into. This process continues until all employees are located in the newly assigned workstations. Once all remaining employees are relocated, the employees which were temporarily relocated are placed in the remaining empty workstations.

Employee numbers are used to lessen confusion. Additionally, all 36 employees are not listed in the seating plan to save additional confusion in the explanation of employee movement. A sample of 18 employees is used (refer to Table 2). A spreadsheet is compiled of the employees who are involved with the move. The second column of the Employee Movement Spreadsheet indicates where the employee’s existing workstation is located. The third column indicates the location where the employee will be moved. The fourth column is used when an employee is moved to a temporary area that is indicated as such on the drawing. As with any other spreadsheet, a comment column allows for any special instructions involving the specified employee.
Steps in the Design Process

As soon as the request for a move project is received by the Workplace Design Department, this protocol is followed: An interview with the supervisor of the respective department is arranged. The designer then finds out what is needed for the department. The same questions are asked, such as: Was this request approved by the supervisor’s superior?; What are your expectations for this project?; What are the exact needs of your request?; How many employees will be involved with the move project?; Is there a need for employee additional space?; etc. Anything that pertains to the movement of employees and equipment must be addressed.

Once the information is gathered from the supervisor, a space assessment is normally conducted; however, in this situation one is not necessary since existing space will be used. Also, this is the time to record any empty workstations that could be used in the temporary staging of department employees. During this stage, neighboring departments are contacted to discuss availability of space and/or how they may be affected. During this particular move project there was no spatial infringement of other departments.

Drawings of the targeted area are compiled and analyzed for accuracy in locating the existing workstations as shown in Figures 10 and 11. Figures 10 and 11 are sections common to the entire Small Business Accounts. As noted previously, to be properly illustrated in this case study, only a section of the entire area can be displayed so the movement of the employees may be explained.
Work and Move Orders

Work and Move Orders are essential in any project. In a *Move* project only Move Orders are compiled for all departments that are involved in the project. This insures that everyone involved is informed. Each department is listed on the Move Orders with its respective responsibilities. A copy of the Employee Movement Spreadsheets and Move Orders are sent to all employees involved so as they can keep abreast of what day they are moving and what needs to be packed up in order for them to be moved without incident. When writing out Move/Work Orders, one must be precise in allocating directives (see Table 3). To make everything clear, things that need to be done should be listed and specified as to the day and time they must be completed. For example, employees at Westfield Group begin work at 8a.m. To best accommodate the employee involved with the initial move of the day, the IT and Maintenance Departments must be scheduled to begin at 7:30a.m. Each department involved with the project receives the Employee Movement Spreadsheet and CAD drawings of the targeted area in advance of the scheduled move.

Timeline

A timeline is a way of displaying a list of events in chronological order, sometimes described as a project artifact. It is typically a graphic design showing a long bar labelled with dates alongside itself and events labelled on points where they would have happened. In short, a timeline is a plan of when something should happen or how much time something should take.
Move Order

Small Business Accounts                Area 2-04

HELP/IT – Please arrange to move phones, computers and printers for employees in Area 2-04 (See attached drawings & spreadsheets for locations).

Sequencing as follows:

- **Thursday, September 27th @ 7:30a.m.** - three (3) employees.
- **Friday, September 28th @ 7:30a.m.** - ten (10) employees.
- **Monday, October 1st @ 7:30a.m.** - ten (10) employees.
- **Tuesday, October 2nd @ 7:30a.m.** - thirteen (13) employees

**Maintenance** – Please arrange to move boxes and chairs for employees in Area 2-04 (See attached drawings & spreadsheets for locations).

Sequencing as follows:

- **Thursday, September 27th @ approx.7:30a.m.** - three (3) employees.
- **Friday, September 28th @ approx.7:30a.m.** - ten (10) employees.
- **Monday, October 1st @ approx.7:30a.m.** - ten (10) employees.
- **Tuesday, October 2nd @ approx.7:30a.m.** - thirteen (13) employees

**Maintenance/Boxes** – Please arrange to deliver 165 boxes to Area 2-04 on or around Wednesday, September 26th. See attached drawing for location.

**Small Business Accounts**: We have scheduled your department move beginning Thursday, September 27th through Tuesday, October 2nd at approx.7:30 am. Boxes will be delivered to you on or around Wednesday, September 26th. Please have your workstation fully packed by the end of the day before your move. (See spreadsheets for the date of your move & drawings for the location of your new work area). Please mark your boxes with your name. Maintenance will move your boxes and IT will move your phone to your temp/new area. IT requests if you work on a laptop please move it and your phone to your temp/new area.
The timeline for this project is set to begin and be completed in four 8-hour days. Since there are 36 employees, the set amount of thirty minutes was given to completely move each employee.

Expectations

In any move there are always complications that arise which will slow down the design process. In this move only a few problems occurred. They had nothing to do with the process; they had to do with the IT department’s timeliness. IT was scheduled to begin work at 7:30a.m. on the first day of the scheduled move. Instead of being on time, the workers arrived at 9a.m., which delayed the schedule an hour and a half. This delay created some tension among the employees who were scheduled to move, as well as producing costly downtime.

The solution to this setback was to contact the supervisor of the IT Department and discuss the importance of the technicians being on time the following day. This complication happens when there is lack of communication between departments. Move Orders were sent through the regular channels and scheduled within the IT Department. Somehow, the technicians did not receive the orders until 9a.m. on the first day of the move. After speaking to the supervisor of the IT Department, the Workplace Design Department supervisor was assured that the IT technicians would arrive on time for the remainder of the move.

The other obstruction was that a few equipment parts were not on hand. There was a special request for two keyboard trays, and only one was available. The keyboard tray was ordered by the furniture manufacturer and was received within a few days and
installed. This lack of a keyboard tray did not cause any downtime because the employee
could continue to work until it was installed.

In hindsight, it would have been better for the designer to communicate more
clearly with the supervisors of the departments involved to ensure that everyone
understood their responsibilities in the project. Having the designer reviewing the
project in a pre-move meeting with all departments involved is always the best solution.
Introduction

Hospitality Operations is a support business unit within Westfield Group's Property and Casualty Division, engaged in the services of lodging, dining, recreation, merchandising, event planning and concierge services. It is a separate department dedicated to promoting the company’s mission, beliefs, and activities. Hospitality Operations’ responsibilities in a corporate setting are all about public relations.

Hospitality Operations serves as the face of Westfield Group for most events and meetings. It is, more or less, about event planning, everything associated with the event, site selection, budgeting, planning travel, entertainment, menu development, registration, and logistics. Hospitality Operations serves as the external planner for meetings and events held at Westfield by non-Westfield entities.

Hospitality Operations is also involved in running incentive programs within the home office to build a positive morale among the employees. Hospitality Operations has 65 full and part time employees. In the peak season from March through September it could have 285-300 seasonal employees who help run the operations. The location of Area 2-08 can be found in Figure 12 in the layout of the Westfield Group facilities.
Figure 12. Hospitality Operations Location. In the shaded area encompasses the Hospitality Operations Department Area 2-08.
Operations has successfully managed include:

1. Creating an internal discounted pricing model for the organization’s use of the facilities
2. Hosting Jr. PGA Championship hosting
3. Hosting Jr. Ryder Cup Hosting
4. Creation of a centralized corporate calendar for the organization
5. Creating Healthy Dining initiative and loyalty points
6. Streamlining Cup of Joe, and Annual Meeting session processes.

Scope of the Project

The Hospitality Operations Department at Westfield Group works as a cohesive team. Unlike most of the Westfield Group employees, they are not on commission. Its highest priority was a request to have a group atmosphere space as opposed to everyone is spread out separately in enclosed workstations. Rayfield’s book “The Office Interior Design Guide” refers to the Westfield Group (see Figure 13) layout as a closed office plan (Rayfield, 1994). The existing layout would be perfect if the department was data entry where each employee is responsible for his/her own portion of the work load, but Hospitality Operations collaborates on every project. There is not just one person on a given project; everyone contributes to ongoing jobs.

Other requests were for extra storage, an area for sorting and compiling materials, and no obstructions between workstations, so each employee could communicate with another without leaving the workstation.
Figure 13. Hospitality Operations Existing Layout. The center area indicated with the existing numbers of the employee workstations is the Hospitality Operations Department.
In the existing layout (refer to Figure 13) employees have separate workstations with high panels cutting off communication between the groups. In order for the group to consult with each other, one member must stop working (which generates down time) and walk around the maze to confer with another colleague. This is the bone of contention within the department.

An open office plan is needed, necessitating a Furniture Move. As discussed previously, Furniture Moves represent a higher level of complexity, with reconfiguration of existing furniture and/or addition of new furnishings, and minimal changes to cabling. Since there is a space constraint, the new layout must conform to the existing space.

For the Furniture Move process to begin, a space assessment needs to be conducted of the existing space. When moving furniture into different configurations, the designer must make sure it stays within the designated space, especially when or if the project takes place in confined or limited office space. The complete set of 11 standards starting on page 19 of this case study was discussed in Westfield Group Intra-Office Churn Process. All 11 standards are included in a Furniture Move are;

1. Review scope of project – Collect information from project contact
   • Ask questions of main contact to fill any gaps and to determine level of importance compared to other work. Is this a priority based on a specific business need or addition to staff?
   • Determine whether other departments are involved so they can be contacted as needed (i.e. – disruption, need to take space from them or move any of their furniture or equipment items).

2. Assess availability of space to meet the needs requested.
• If a reconfiguration is involved, do a quick review to determine whether anything will need to be ordered to help determine when the project will be implemented to give requestor an idea of timeframe to completion. If it is a rush project, this gives an opportunity to get items on order sooner than later. If it is not a rush, ordering would wait until drawings, etc. are completed.

3. Contact surrounding departments to discuss availability of space and/or how they may be affected.

4. Complete drawings (if applicable), depending on size of reconfiguration.
   • Complete new layout options using AutoCAD (depending on project size, complete either block - plan or show furniture/panels).
   • Transmit option(s) to contact via email.
   • Meet with contact again as needed.
   • Complete additional options or if approved, finalize drawing.
   • Request new personnel seating chart from contact.
   • Walk through area to note current seating chart, printer location, etc.

5. Reconcile the system panels and furniture (existing drawing to new drawing layout) to develop pull list. Give to Maintenance to complete.
   • Check in-house stock for panels/furniture coordinating the use with other projects in planning.
   • Request quote for missing items from Furniture Dealer salesperson
   • Order furniture

6. Determine the approximate implementation date, based on new furniture arriving.
• For large projects, develop phasing for reconfiguration. One must confirm that size of phase will accommodate temporary seating for employees, as needed.
• If it is a large project that requires phasing, develop the teardown and rebuild phases.
• Schedule project (with Furniture Dealer if they are handling the implementation).
• Transmit the new and existing drawings with the applicable phasing noted on it to get available labor dates from project manager. Transmit furniture dealer the AutoCAD version and Portable Document Format (PDFs) with the phasing if not all on AutoCAD. PDF are file format created by Adobe Systems, Inc. that enables sharing of files with others who do not have the same software.
• Make sure projects are not overbooked by phasing or scheduling conflicts.

7. Reconfigure the panels and furniture. Notify IT Department (Information Technology) for de-cabling and cabling of workstation panels. The network cable runs through the panels of each workstation. In order to separate the panels for reconfiguration the cables must be removed. Once the panels are reconfigured in a new layout the network cables must be installed before the project can move forward. Inform leader of Maintenance for power pole and base power-in changes.

8. Complete “To/From” move spreadsheets to detail the moving of employees into final or temporary seating for each phase of the project (if it is a short list of employees, it can be included in the body of the work order and not on a separate spreadsheet.)

9. Complete work orders for all other departments involved in the employee moves as applicable.
• Notify IT, Maintenance, and all employees listed on the move spreadsheet (and managers) to schedule the reconfiguration with them.

• Notifications include dates, tasks for IT and Maintenance, and packing instructions for employees.

10. Answer questions, make adjustments and update schedule to all involved as needed.

11. Generate a punch list and submit to appropriate parties ensuring follow up. A punch list is generally a list of tasks or "to-do" items that must be completed for a project to be fulfilled, such as a keyboard tray that was not installed, additional shelving that is missing, or a privacy panel that was overlooked, etc. (Miller, 2005).

Departments involved with the Project

The departments involved with the Hospitality Operations Furniture Move are Maintenance Department, IT/HELP DESK, Furniture Installers, Electricians, and Cabling Technicians.

The IT Department is responsible for disconnecting the employee’s computer system, phone, and any other electronic equipment in the existing workstation. IT will move the equipment to the new workstation and reconnect it to the network. The Maintenance Department is responsible for moving all the employee’s possessions to the new workstation. Maintenance is also responsible for installing any hardware that may be needed in the new workstation. For example, a keyboard tray is installed under the work surface, a stand-up work surface, and, possibly, an additional panel or overhead storage bin. Furniture Installers are accountable for following the layout prepared by the Workplace Design Department and installing the systems furniture. The Cabling
Technicians are responsible for running the wiring to connect with the network. Furniture Installers and Cabling Technicians work simultaneously with each other. As the Furniture Installers connect panels, the Cabling Technicians will run the cable through the panels. The Electricians will disconnect power poles and reconnect them in a location according to the new furniture layout.

Steps in the Design Process

When the request for a reconfiguration project is received by the Workplace Design Department, the protocol noted previously is followed. Again, an interview with the supervisor of the respective department is arranged. The designer finds out what is needed for the department. Certain questions are asked, such as: Was this request approved by the supervisor’s superior?; What are your expectations for this project?; What are the exact needs of your request?; How many employees will be involved with the move project?; Is there a need for employee additional space?; etc. Anything that pertains to the movement of employees and equipment must be addressed. Once the information is gathered from the supervisor, a space assessment is conducted.

Even in the case of a Furniture Move project, a space assessment is conducted because of the limited office space. Space assessment involves finding the amount of area available to work within. This is the process where calculations of the useable square footage of the targeted space are made. Also, one must conduct a detailed review of the existing tenancy, departmental structure, staff requirements, and number of offices, meeting rooms, workstations, and projected growth requirements. This assures availability of space to meet the needs requested. Also, this would be the time to record
any empty workstations that could be used in the temporary placement of department employees. During this point of the project neighboring departments are contacted to discuss availability of space and/or how they may be affected. During this reconfiguration project there was no spatial infringement of other departments.

Another process that must be conducted in the targeted area is a panel and furniture reconciliation. The existing layout of panels and furniture is documented in the size, type, quantity, and color of skins. The existing layout is compared to the new furniture layout and evaluated on what is needed to complete the new reconfiguration. Once a count is conducted, the Maintenance Department will check the inventory for furniture that is needed for the reconfiguration. If there are pieces that are needed and are not in stock, the Workplace Design Department is notified and the needed pieces are ordered from the Furniture Dealer Ohio Desk.

Drawings of the target area are compiled and analyzed for accurate locations of existing workstations (refer to Figure 13). Drawings are compiled for the reconfiguration (see Figure 14), and a set of drawings are completed for the different phases that will take place during the installation. In a reconfiguration of a department, one cannot tear down all existing workstations and rebuild them. While this would be optimal in many ways, it is also unrealistic. Figures 15 & 16 of the targeted space, the department is broken down into phases of installation. In this case, there will be four phases in the “teardown” and four phases of the “build” in the Hospitality Operations Department. Each phase is encompassed with a bold boundary and noted with the phase number, and the date on which the installation is scheduled. There are two sets of drawings for this, one is the
Figure 14. Hospitality Operations New Layout. The center area indicated with the new numbers of the employee workstations is the Hospitality Operations Department.
Figure 15. Hospitality Operations Teardown Phases. Each teardown is encompassed with a bold line and noted with the teardown number, and the date on which the teardown is scheduled. This is the teardown phase of workstations. Each one indicating what area is going to be targeted to begin and end.
Figure 16. Hospitality Operations Build Phases. Each Build is encompassed with a bold line and noted with the Build number, and the date on which the installation is scheduled. This is the build phase of workstations. Each one indicating what area is going to be targeted to begin and end.
“teardown phase” of workstations, and the second is the workstation “build phase.” Each one indicated what area is going to be targeted to begin and end.

Work and Move Orders

Work and Move Orders are essential in any project. In a Move project only Move Orders are compiled for all departments that are involved. Since this will be a panel reconfiguration, work orders and move-only orders will be issued. This insures that everyone affected understands. Each Westfield Group department involved with the reconfiguration is listed on the Work/Move Orders with its specific responsibilities. Also, each department involved with the project receives CAD drawings of the targeted area. A copy of the Employee Movement Spreadsheets (see Table 4), Move Orders (see Table 5), and Work Orders (see Table 6) are sent to all employees affected so they can keep abreast of what day they are moving and what needs to be packed up in order for them to be moved without incident.

When writing Work/Move Orders, one must be precise in allocating directives (see Table 4). Everything that needs to be done should be listed, made clear, and specified as to day and time it must be completed. As noted, employees at Westfield Group begin their work day at 8a.m. In order to be prepared for the initial employee moves, the IT and Maintenance Departments are scheduled to begin preparation at 7:30a.m. in order to minimize lost productivity.
Table 4. Employee Movement Spreadsheet. Hospitality Operations Employee Movement Spreadsheet is itemized, informing all employees of their scheduled moves. This spread sheet keeps all employees abreast of all movements and changes in the ongoing project.

<table>
<thead>
<tr>
<th>DEPARTMENT NAME</th>
<th>MOVES</th>
<th>DATE and approximate time of move</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hospitality Operations</td>
<td>Main Seating Chart</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee #1</td>
<td>2-08 1E</td>
<td>2-08 14</td>
<td>Moved on 6/1 to 2-08 14, permanent work area</td>
</tr>
<tr>
<td>Employee #2</td>
<td>2-08 2E</td>
<td>2-08 12</td>
<td>Moved on 5/31 to 2-08 6E, Temp., 6/1 moved to 2-08 12 permanent work area</td>
</tr>
<tr>
<td>Employee #3</td>
<td>2-08 3E</td>
<td>2-08 5</td>
<td>Moved on 5/29 to 2-08 9E, Temp., 6/1 moved to 2-08 5 permanent work area</td>
</tr>
<tr>
<td>Employee #4</td>
<td>2-08 4E</td>
<td>2-08 6</td>
<td>Moved on 5/29 to 2-08 17E, Temp., 6/1 moved to 2-08 6 permanent work area</td>
</tr>
<tr>
<td>OPEN</td>
<td>2-08 5E</td>
<td>2-08 1</td>
<td>New team member moved to 2-08 1, on 5/30</td>
</tr>
<tr>
<td>OPEN</td>
<td>2-08 6E</td>
<td>2-08 2</td>
<td>New team member moved to 2-08 2, on 6/1</td>
</tr>
<tr>
<td>Employee #5</td>
<td>2-08 7E</td>
<td>2-08 10</td>
<td>Moved on 5/29 to 2-08 6E, Temp., 5/30 moved to 2-08 10 permanent work area</td>
</tr>
<tr>
<td>OPEN</td>
<td>2-08 8E</td>
<td>2-08 4</td>
<td>New team member moved to 2-08 4, on 6/1</td>
</tr>
<tr>
<td>OPEN</td>
<td>2-08 9E</td>
<td></td>
<td>Open areas were relocated and given new locator numbers please refer to drawing</td>
</tr>
<tr>
<td>Employee #6</td>
<td>2-08 10E</td>
<td>2-08 3</td>
<td>Moved on 5/30 to 2-08 3, permanent work area</td>
</tr>
<tr>
<td>Employee #7</td>
<td>2-08 11E</td>
<td>2-08 13</td>
<td>Moved on 6/1 to 2-08 3, permanent work area</td>
</tr>
<tr>
<td>OPEN</td>
<td>208 12E</td>
<td></td>
<td>Open areas were relocated and given new locator numbers please refer to drawing</td>
</tr>
<tr>
<td>Employee #8</td>
<td>2-08 13E</td>
<td>2-08 2</td>
<td>Moved on 6/1 to 2-08 2, permanent work area</td>
</tr>
<tr>
<td>Employee #9</td>
<td>2-08 14E</td>
<td>2-08 8</td>
<td>Moved on 5/29 to 2-08 9E, Temp., 6/1 moved to 2-08 8 permanent work area</td>
</tr>
<tr>
<td>Employee #10</td>
<td>2-08 15E</td>
<td>2-08 7</td>
<td>Moved on 5/29 to 2-08 12E, Temp., 6/1 moved to 2-08 7 permanent work area</td>
</tr>
<tr>
<td>Copier Station</td>
<td>2-08 16E</td>
<td></td>
<td>Open areas were relocated and given new locator numbers please refer to drawing</td>
</tr>
<tr>
<td>OPEN</td>
<td>208 17E</td>
<td></td>
<td>Open areas were relocated and given new locator numbers please refer to drawing</td>
</tr>
<tr>
<td>Community Area</td>
<td>2-08 18E</td>
<td></td>
<td>Open areas were relocated and given new locator numbers please refer to drawing</td>
</tr>
</tbody>
</table>
HELP – Please arrange to move phones, computers, and printers in Area 2-08 on Monday, June 4th through June 13\textsuperscript{th} @ approx. 7:30a.m. See attached drawings & spreadsheets for locations and dates.

Anthony – Please arrange to move boxes and chairs in Area 2-08 Monday, June 4th through June 13\textsuperscript{th}. Please see drawings and spreadsheets for temporary and permanent locations of the employees.

Bernie – Please arrange to deliver between 65-70 boxes to Area 2-08 on May 30th.

Hospitality Operations Employees – We have scheduled the reconfiguration of your area for Monday, June 4\textsuperscript{th} through June 13\textsuperscript{th}. Some of you will be moved into temporary cubicles while the new workstations are being built (See drawings and spreadsheets for your individual date to move). Please have your workstation fully packed by the end of the day before your move. For example: if you are in the first move you must be fully packed by the end of the day on June 1\textsuperscript{st}, the second move June 7\textsuperscript{th} etc… check spreadsheet for the dates. The workroom area needs to be fully packed as well. Your vertical files need not be packed we can have them slid into place. Boxes will be delivered to you around Wednesday 5/30. Please mark your boxes with your name. Maintenance will move your boxes and IT will move your phones and desktop computers. IT requests if you work on a laptop please move it and your phone to your temp/new area.
Table 6. Hospitality Operations Work Order. This Work Order is given to all the department leaders who are involved with the reconfiguring of the targeted area. Work orders are compiled and distributed to Electricians, Furniture Installers, and Cable Technicians.

<table>
<thead>
<tr>
<th>WORK ORDER</th>
<th>AREA 2-08</th>
<th>MAY 29TH – JUNE 7TH</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ohio Desk</td>
<td>– See attached drawings for teardown and re-build dates.</td>
<td></td>
</tr>
<tr>
<td>HELP/AL</td>
<td>– Ohio Desk will be here on Tuesday, May 29, 2012 through June 7th to reconfigure Area 208. Please arrange to de-cable workstations in existing drawing, and cable workstations in the new drawing. Drawings are attached.</td>
<td></td>
</tr>
<tr>
<td>Maintenance</td>
<td>George Swinehart – Please arrange to disconnect four (4) power poles and connect five (5) power poles (see drawings for location) in area 2-08 on May 29th through June 7th.</td>
<td></td>
</tr>
</tbody>
</table>

Timeline

When a reconfiguration is warranted, more time is allowed because it is a complicated undertaking. In this case ten days were allocated. On day one, at 7:30 a.m. four employees were moved to temporary workstations before the beginning of the IT work day. IT connected employees’ computers to the network, Maintenance moved all employee belongings to the temporary workstations, and Electricians disconnected one power pole supplying electricity to the targeted workstations. The Furniture Installers allocated one day to teardown workstations E7, E10, E11, E12, E13, and E14 (refer to Figure 15). When the Furniture Installers begin to disengage the panel system, the Cable Technicians must be available to disconnect the cable wires running through the panels before the Furniture Installers can safely separate the panels and remove them. Once the
workstations are disconnected from the network, de-cabled, and the power pole removed, the Furniture Installers are free to break down the existing furniture and begin to build the new furniture layout.

This is the same process that is conducted in every phase of the project. Figure 16 is an illustration of the new workstations that were installed indicated in Build 1. Cable technicians were available to wire the new panels while installed. The Electrician was also available to install two power poles as indicated on the new furniture configuration. On the last day of the move employees who were placed in temporary workstations were moved by the Maintenance Department to the newly built workstations, and Build 2 could then begin.

Build 2 began at 7:30 a.m. Two employees were moved by the Maintenance Department to temporary workstations before the beginning of their work day. IT connected employee’s computers to the network, Maintenance moved all employee belongings to the temporary workstations, and Electricians disconnected one power pole that was supplying electricity to the targeted workstations. The Furniture Installers allocated four hours to teardown workstations E1 and E2 (refer to Figure 15) and allocated one and a half days to build workstations 1, 2, &3 (refer to Figure 16). Furniture Installers initiate teardown of the panel system. Cable Technicians must be available to disconnect the cable wires running through the panels before furniture installers can safely separate the panels and remove them. Once the workstations are disconnected from the network, de-cabled, and the power pole removed, Furniture Installers are free to teardown the existing furniture and to begin to build the new furniture layout. As in Build 1, the duties are the same for the Maintenance Department,
Cabling Technicians, and the Electrician. The Cable Technicians are available to wire the new panels after they are installed. The Electrician is also available to install one power pole as indicated on the new furniture configuration (refer to Figure 16).

On day three at 7:30 a.m., employees who were placed in temporary workstations can now move by the Maintenance Department to the newly built workstations. Build 3 can begin.

Build 3 and 4 follow the same process as Build 1 and 2. Build 3 started on day four, with one day allocated for teardown and two days allowed for completion. Since Build 4 only involved one workstation, the teardown and build was conducted on day five. No matter how many workstations are involved, the same process is performed. At 7:30 a.m. employee belongings were moved to temporary workstations before the beginning of their work day. IT connected employees’ computers to the network, Maintenance moved all employee belongings to the temporary workstations, and electricians disconnected any power poles supplying electricity to the targeted workstations. Once the build phase began, cable technicians were available to wire the new panels as they were installed; the electrician was also available to install power poles as indicated on the new furniture configuration (refer to Figure 16).

After the completion of Build 4, the Workplace Design Department made a walk-through of the Hospitality Operations new workstation layout. A walk-through consists of visually comparing the new actual layout to what was designed and shown on approved drawings. Questions asked are: Were the CAD drawings adhered to by the Furniture installers? Did the workstations receive all the proper equipment? What, if any equipment is requested from employees that was not asked for but is now needed in the
workstation? Also the facility manager looks for any parts and pieces which are missing from the panel and furniture installing. Missing pieces might include corner pieces that finish off a panel, outlet covers, and anything else that is missing so as to not give a finished look to the new layout. Once the walk-through has taken place, the facility manager completes a punch list. As noted, a punch list is an itemized list that consists of all the missing items with instructions to the Maintenance Department to complete.

Expectations

The potentials of this furniture move surpassed expectations the Workplace Design Department had anticipated. From the beginning of the project to the end, it went without a problem. There were no delays with other departments in the duties or their responsibilities. The total down time of employees involved was zero. The punch list contained three minor items that the Maintenance Department took care of the final day of the build. This is not a typical occurrence in a project of this magnitude. Usually, there is at least one aspect of the build that will cause problems, but in this case the Furniture Move was a complete success.
CHAPTER V

AREA 1-08, 1-09, 1-10 CLAIMS – CONSTRUCTION MOVE

Introduction

Westfield Group, like all insurance agencies, has a department dedicated to administering claims for the losses incurred by the insured. This section of an insurance company evaluates claims for their subsequent payment. This is by far the largest department at Westfield Group. The number of employees in the Claims Department is approximately 100. The Claims Department covers three sections on the first floor of the Westfield Group’s facilities: Area 1-08, Area 1-09, and Area 1-10 (See figure 17).

Dealing with a large number of people in different departments requires orchestration so that no employee is slighted or offended by the outcome. Westfield Group considers each department as equal. There is no standard of hierarchy in this company; considerations are only made when upper executives are part of the equation. As a rule of thumb, most upper executives are housed in finished full-height walled offices.

A Construction Move is the most complicated move of the three moves discussed in this case study. It is all three moves combined. The employees are moved to temporary workstations, and new configurations of the work areas take form.
Figure 17. Claims Department Location: In the shaded area encompasses the Claims Department. Areas 1-08, 1-09, 1-10
Certain areas are allocated for full-height demountable walls which are installed for the Claims managerial staff.

When working with 100 employees, one must anticipate problems before they occur. To ensure that the project goes on without any difficulty, it is imperative in a Construction Move that the contact person and the Workplace Design Department work closely together. Also, it is vital for the designer to communicate with only one contact. Employees should not be privy to all decisions being made about the move. When dealing with a large number of employees, it is seemingly easier to make mistakes. Once too many people enter the decision-making process, chaos ensues. The contact who was chosen in this project was the administrative secretary; she had the authority to make decisions without conferring with her superiors.

Scope of the Project

Three additional departments in different locations were to be included in this project. Those three departments needed to be relocated from their existing areas into the Claims Department section of the facility. These three departments are the Work Flow Coordinators, located on the second floor; Analytics Resource Center, located on the second floor; and the Resource Center, located on the third floor.

The scope of this Construction Move included reorganizing workstations in the Claims Department; building full-height demountable walled offices for supervising managers of the Analytics Resource Center; allocating a section for the Analytics Resource Center department; earmarking space for the Work Flow Coordinators; and relocating the Resource Center to the Work Flow Coordinators former space.
Because five departments are involved with this *Construction Move*, a detailed space assessment is warranted of all the existing areas. A detailed assessment establishes what space and tenancy requirements are needed before the planning of the proposed workstations. Space assessment involves finding the amount of area available to work within. Calculations of the useable square footage of the targeted space are made. A detailed review of the existing tenancy, departmental structure, staff requirements, and number of offices, meeting rooms, workstations, and projected growth requirements is conducted. This can be facilitated by using CAD software which shows the building floor plan and the exact square footage. Projects of this magnitude require on-site field measurements to double check or verify the calculations provided by the CAD software.

The full 11 standards of a *Construction Move* are included here:

1. Review scope of project – Collect information from project contact
   - Ask questions of main contact to fill any gaps and to determine level of importance compared to other work. Is this a priority based on a specific business need or addition to staff?
   - Determine whether other departments are involved so they can be contacted as needed (i.e. – disruption, need to take space from them or move any of their furniture or equipment items).

2. Assess availability of space to meet the needs requested.
   - If a reconfiguration is involved, do a quick review to determine whether anything will need to be ordered to help determine when the project will be implemented to give requestor an idea of timeframe to completion. If it is a rush project, this
gives an opportunity to get items on order sooner than later. If it is not a rush, ordering would wait until drawings, etc. are completed.

3. Contact surrounding departments to discuss availability of space and/or how they may be affected.

4. Complete drawings (if applicable), depending on size of reconfiguration.
   - Complete new layout options using AutoCAD (depending on project size, complete either block - plan or show furniture/panels).
   - Transmit option(s) to contact via email.
   - Meet with contact again as needed.
   - Complete additional options or if approved, finalize drawing.
   - Request new personnel seating chart from contact.
   - Walk through area to note current seating chart, printer location, etc.

5. Reconcile the system panels and furniture (existing drawing to new drawing layout) to develop pull list. Give to Maintenance to complete.
   - Check in-house stock for panels/furniture coordinating the use with other projects in planning.
   - Request quote for missing items from Furniture Dealer salesperson
   - Order furniture

6. Determine the approximate implementation date based on new furniture arriving
   - For large projects, develop phasing for reconfiguration. One must confirm that size of phase will accommodate temporary seating for employees, as needed.
   - If it is a large project that requires phasing, develop the teardown and build phases.
• Schedule project (with Furniture Dealer if they are handling the implementation)
• Transmit the new and existing drawings with the applicable phasing noted on it to get available labor dates from project manager. Transmit furniture dealer the AutoCAD version and Portable Document Format (PDFs) with the phasing if not all on AutoCAD. PDF is a file format created by Adobe Systems, Inc. that enables sharing of files with others who do not have the same software.

Make sure projects are not overbooked by phasing or scheduling conflicts.

7. Reconfigure the panels and furniture. Notify IT Department (Information Technology) for de-cabling and cabling of workstation panels. The network cable runs through the panels of each workstation. In order to separate the panels for reconfiguration the cables must be removed. Once the panels are reconfigured in a new layout, the network cables must be installed before the project can move forward. Inform leader of Maintenance for power pole and base power-in changes.

8. Complete “To/From” move spreadsheets to detail the moving of employees into final or temporary seating for each phase of the project (if it is a shortlist of employees, it can be included in the body of the work order and not on a separate spreadsheet.)

9. Complete work orders for all other departments involved in the employee moves as applicable

   • Notify IT, Maintenance, and all employees listed on the Employee Movement Spreadsheet (and managers) to schedule the reconfiguration with them.

   • Notifications include dates, tasks for IT and Maintenance, and packing instructions for employees.
10. Answer questions, make adjustments and update schedule to all involved as needed.
11. Generate punch list and submit to appropriate parties ensuring follow up.

(Miller, 2005).

Departments involved with the Project

Six departments are involved with a *Construction Move*. These are IT/HELP, Maintenance Department, Furniture Dealer, Furniture Installers, Cabling Technicians, and Electricians.

The IT/HELP Department is responsible for disconnecting the employee’s computer system, phone, and any other electronic equipment in the existing workstation. IT will move the equipment to the new workstation and reconnect it to the network. The Maintenance Department is responsible for moving all the employee’s possessions to the new workstation. Maintenance is also responsible for installing any hardware that may be needed in the new workstation. For example again, a keyboard tray is installed under the work surface, a stand-up work surface, and possibly an additional panel or overhead storage bin, etc.

The Furniture Dealer is responsible for the accurate and timely ordering of all furniture need to complete the project. After a panel and furniture reconciliation is conducted, the Furniture Dealer will order product needed to finalize the project.

Furniture Installers are accountable for following the layout prepared by the Workplace Design Department when installing the systems furniture. The Cabling Technicians are responsible for running the wiring to connect with the network. The Furniture Installers and Cabling Technicians work simultaneously with each other. As
the Furniture Installers construct the panels the Cabling Technicians will run the cable through the panels as well. The Electricians will disconnect power poles and reconnect them in a different location according to the furniture layout.

Steps in the Design Process

When the request for a reconfiguration project is received by the Workplace Design Department, the same process as previously noted for all Moves is the protocol followed: An interview with the supervisor of the respective department is arranged. The designer then finds out what is needed for the department. Certain questions are asked, such as: Was this request approved by the supervisor’s superior?; What are your expectations for this project?; What are the exact needs of your request?; How many employees will be involved with the move project?; Is there a need for employee additional space?; etc. Anything that pertains to the movement of employees and equipment must be addressed. Once the information is gathered from the supervisor, a space assessment is conducted of the area to ensure there is an ample amount of available space for the request.

In the case of a Construction Move project a space assessment is conducted. Space assessment involves finding the amount of area available to work within. This is the process where calculations of the useable square footage of the targeted space are made. Also, one must conduct a detailed review of the existing tenancy, departmental structure, staff requirements, and number of offices, meeting rooms, workstations, and projected growth requirements. Also, this would be the time to record any empty workstations that could be used in the temporary placement of department employees.
During this point of the project, neighboring departments are contacted to discuss availability of space and/or how they may be affected.

Another process that must be conducted in the targeted area is a panel and furniture reconciliation. The existing layout of panels and furniture is documented in the size, type, quantity, and color of skins (panel fabric). The existing layout is compared to the new furniture layout and evaluated on what is needed to complete the new reconfiguration. Once a count is conducted, the Maintenance Department will check the inventory for furniture that is needed for the reconfiguration. If there are pieces that are needed and are not in stock, the Workplace Design Department is notified and the needed pieces are ordered from the Furniture Dealer.

Promptly, drawings of the target area are compiled and analyzed for accurate placement of existing workstations (see Figure 18). Not only are drawings compiled for the reconfiguration, a set of drawing are collected for the different phases that will take place during the installation. In a Construction Move of a department, one cannot tear down all existing workstations and rebuild them because there is limited space to work with, so the project needs to be broken down into phases. While it would be optimal in many ways to teardown everything and work in an unobstructed area, in this case it is unrealistic. In this particular reconfiguration, however, the Workplace Design Department was fortunate to be able to completely teardown and rebuild a few areas without working around existing employee workstations. Enough empty workstations were located in neighboring departments to accommodate employees temporarily who were involved with the Construction Move.
Figure 18. Claims Department Existing Layout. This is an overview of the existing workstation arrangements of the Claims Department.
The department is broken into phases of installation of the targeted space. Each Teardown/Build is shown with a bold line, the Teardown/Build number, and noted with the date on which the installation is scheduled to begin. There are two sets of drawings for this, one is the teardown of workstations (see Figure 19), and the second is the build of workstations (see Figure 20). Each one indicating what area is targeted to begin and the second drawing noted when the Build is to be completed. Reconfigure existing workstations to accommodate additional workstations requires creative space planning skills, especially when working with a limited amount of office space. Three separate departments were being relocated in this particular project. This adds to the level of difficulty in the design process. A space assessment is conducted on each department’s existing area to be certain that the department that is moving will have enough area to conduct their duties. For example, the Resource Center located on the third floor is moving into the Work Flow Coordinators located on the second floor. The space that the Resource Center is moving into is smaller than the existing space they now occupy. Assurances need to be made to Resource Center that they would have the space needed to run their department efficiently. Again, this is where creative space planning is necessary and time consuming. Several floor plan layouts are drawn up by the interior designer for the approval of the Claims department supervisor. It is not common for the department in question to accept the first layout. Usually, it takes several revisions for the plan to be acceptable to the department manager.

The process of drawing floor plan layouts is repeated for each department involved with the Construction Move. Work Flow Coordinators are relocating from the second floor to the first floor in Area 1-10, the Analytics Resource Center department is
Figure 19. Claims Department Teardown Phases. This view reveals the location and date when the respective area will be disassembled.
A space assessment is necessary because the Workplace Design Department requires detailed planning for the construction of various areas. The following areas are scheduled for different construction phases:

**Build 1 Area 1-10**
- Dates: 5/20, 21, 22

**Build 2 Area 1-10**
- Dates: 5/20, 21, 22

**Build 3 Area 1-10**
- Dates: 5/28, 29, 30

**Build 4 Area 1-10**
- Dates: 5/31, 6/3, 4, 5

**Build 5 Area 1-10**
- Dates: 6/6, 7, 10

**Build 6 Area 1-10**
- Dates: 6/11, 12, 13, 14, 17

**Build 7 Area 1-10**
- Dates: 6/18, 19

**Build 8 Area 1-10**
- Dates: 6/24, 25, 26, 27

**Arc Department**
- Dates: 6/24, 25, 26, 27

Figure 20. Claims Department Build Phases. This view reveals the location and date when the respective area will be built.
relocating from the second floor to the first floor in Area 1-09, and the Claims department is condensing workstations to remain in its existing area.

The design process in any Construction Move is lengthy. Several preliminary layout drawings were created along with several alternative plans. The process of developing acceptable layouts for the departments involved took over eight weeks. Once all departments have approved their respective final furniture layout, the Work and Move Orders must be compiled. This is another time consuming process because it is pivotal that the orders are precise in relaying the information to all departments that are involved, so there are no discrepancies in installation dates and time.

Work and Move Orders

As previously stated, Work and Move Orders are essential in any project. In a Move Project only Move Orders are compiled for all departments that are involved. Since this will be a total reconfiguration, both Work and Move Orders will be issued. This insures that everyone affected has a clear understanding of the process. Each Westfield Group department involved with the reconfiguration is listed on the Work/Move Orders with their respective responsibilities. Also, each department involved with the project receives CAD drawings of the targeted area. A copy of the Employee Movement Spreadsheet and Move Orders are sent to all employees affected so as they can keep informed of what day they are moving and what needs to be packed up in order for them to be moved without incident (see Table 7). When writing Move/Work Orders, one must be precise in allocating directives (see Tables 8 and 9). All action items should be listed and clarified as to what date and time they must be completed.
Table 7. Claims Employee Movement Spreadsheet. This is an example of the spreadsheet that the employees of the Claims Department received. This spreadsheet along with the move orders will keep all employees informed of what is happening on what day.

<table>
<thead>
<tr>
<th>DEPARTMENT NAME</th>
<th>MOVES</th>
<th>DATE and approximate time of move</th>
<th>Comments</th>
</tr>
</thead>
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<td></td>
<td></td>
</tr>
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<td>1-10 7</td>
<td></td>
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</tbody>
</table>
Table 8. Claims Move Order. An example of the orders for the construction move of the Claims Department.

**Move Order**

**Claims, ARC, WFC, RC, I-Desk**

**HELP** – Please arrange to move phones, computers, and printers for employees in the upcoming reconfigurations May 20th – July 9th. See attached drawings & spreadsheets for locations and dates.

**Anthony** – Please arrange to move boxes and chairs for employees in the upcoming reconfigurations May 20th – July 9th. See attached drawings & spreadsheets for locations and dates.

**Bernie** – Please arrange to deliver 15 boxes to Area 1-10, on or before Friday, 5/10. Also, please arrange to deliver between 80 to 100 boxes to Area 1-09 on or before Friday, 5/17 and 80 to 100 boxes to Area 1-08 on or before Tuesday, 5/21. Please arrange to deliver 60-70 boxes to Area 3-05 on or before Wednesday, 6/12, 45-55 boxes to Area 3-07 on or before Thursday, 6/13, and 45-55 boxes to Area 3-09 on or before Monday, 7/1. Many boxes can be reused & moved from one area to another.

**Move information & instructions for employees** – We have scheduled the reconfiguration of your area for Friday, May 20th through July 9th. There is a possibility that some of you will be moved into temporary cubicles while the new workstations are being built (See drawings and spreadsheets for your individual date(s) to move). Please have your workstation fully packed by the end of the day before your move. **For example:** if your scheduled move date is May 20th, you must be fully packed by the end of the day on Friday, May 17th, check spreadsheet for the dates. Also if you have any vertical or lateral files please have that packed up as well before your move. Boxes will be delivered to the area around a week before you are to move. Please mark your boxes & desk chair with your name. Maintenance will move your boxes & chair, and IT will move your phones and desktop computers. IT requests if you work on a laptop please move it and your phone to your temp/new area. (Miller, 2010)
Table 9. Claims Work Orders. An example of the work orders for the Construction Move of the Claims Department. This order is given to the department heads that are involved with the project.

<table>
<thead>
<tr>
<th>Work Order</th>
<th>Areas 1-08, 1-09, 1-10, 3-07</th>
</tr>
</thead>
</table>

**HELP/Al** – Please arrange to de-cable and cable the necessary panels for the upcoming reconfigurations May 20th – July 9th. Please see drawings of areas 1-08, 1-09, 1-10, 3-07 for specific information on phasing.

**Maintenance** - Please arrange to move or disconnect power poles in the necessary areas for the upcoming reconfigurations May 20th – July 9th. Please see drawings of areas 1-08, 1-09, 1-10, 3-07 for specific information on phasing.

**Ohio Desk** - Please arrange to tear down and build cubicles in the areas previously discussed for May 20th – July 9th. Please see drawings of areas 1-08, 1-09, 1-10, 3-07 for specific information on phasing.

If you have any questions or concerns please feel free to contact Workplace Design Department.

(Miller, 2010)
Timeline

The time allotted for this project was eight weeks. A spreadsheet was developed which communicated the “teardown” and “build” by day and time for the supervisor and employees (refer to Table 7). The process is identical in this Construction Move to the previously discussed Moves. Cabling Technicians, Maintenance, and Electricians are on hand the morning of the move to execute their duties in disconnecting network cables, power poles, and moving employees into temporary workstations. The process is consistent with adhering to standards set forth by Westfield Group in every phase of the Construction Move. Employees in Area 1-10 were moved to temporary workstations on day one while the existing workstations were broken down to make room for the new reconfiguration of this area (see Figure 21).

Since this existing space is largely vacant, this is the space in which Workplace Design Department decided to begin the Construction Move. The far west end of this area is designated to stage panels and furniture that is being disconnected in this area for future Builds. Also, extra panels and furniture brought from the warehouse were stored in this area until needed in other area builds. This enabled the installers to have the equipment close at hand, saving time in reconstructing the new workstation layouts, rather than sending to the warehouse when additional equipment is required. It took one day to break the targeted workstations down and another day to rebuild them in the new Configurations. As illustrated in Figure 21, larger workstations were broken down to be replaced with smaller workstations (see Figure 22).
As soon as the reconfiguration was completed in Area 1-10, employees who were scheduled to be relocated, were moved the following morning by the maintenance department (see Figure 22).

While moving into the Build 3 of the Construction Move (see Figure 23), eight employees needed to be temporarily relocated while Area 1-08 was being reconfigured. The time allocated for this build was three days. The eight employees were temporarily relocated in different departments within vacant workstations until their permanent area was reconfigured. The manager workstation in the far west end of Area 1-08 was not completely broken down. Panels needed to be removed and the workstation configured to meet Westfield Group’s workstation standards. This involved removing one 25"W x 65"H panel and reducing the area of the existing Manager workstation. Manager workstations that are against the south end of this area are not broken down; they are moved thirty seven inches toward the west end of the area to make room for an additional Manager workstation (see Figure 24).

Teardown 3 of Area 1-08 as shown in Figure 23 is completely broken down and reconfigured as shown in Figure 24. Included in Teardown 3 is a section in Area 1-09 (see Figure 25). This area is vacated after the Build 2; employees in this section are moved to Area 1-10 to their permanent workstations. This enables the Furniture Installers to completely teardown these vacated section and use the existing panels and Figure 21. Construction Move Teardown One and Two. Overview of Area 1-10 where the Construction Move project began.
Figure 22. Construction Move Build One and Two. At this time the reconfiguration of Area 1-10 was complete. The west end on this area is still being used as a staging area for system furniture.
While moving into the Build 3 of the *Construction Move* (see Figure 23), eight employees needed to be temporarily relocated while Area 1-08 was being reconfigured. The time allocated for this build was three days. The eight employees were temporarily relocated in different departments within vacant workstations until their permanent area was reconfigured. The manager workstation in the far west end of Area 1-08 was not completely broken down. Panels needed to be removed and the workstation configured to meet Westfield Group’s workstation standards. This involved removing one 25”W x 65”H panel and reducing the area of the existing Manager workstation. Manager workstations that are against the south end of this area are not broken down; they are moved thirty seven inches toward the west end of the area to make room for an additional Manager workstation (see Figure 24).

Teardown 3 of Area 1-08 as shown in Figure 23 is completely broken down and reconfigured as shown in Figure 24. Included in Teardown 3 is a section in Area 1-09 (see Figure 25). This area is vacated after the Build 2; employees in this section are moved to Area 1-10 to their permanent workstations. This enables the Furniture Installers to completely teardown these vacated section and use the existing panels and furniture in Build 4. The entire teardown and Build 3 took three days, and the employees were moved into the new layout on the morning of the fourth day.
Figure 23. Claims Department Area 1-08 Teardown three. An overview of Area 1-08 in the teardown portion of the Construction Move.
Figure 24. Claims Department Area 1-08 Build three. Totally reconfigured and ready for the employees to be moved into their permanent workstations.
Figure 25. Area 1-09 Teardown Three. Existing workstations where broken down to make room for the new reconfiguration. This Teardown was done simultaneously with figure #23.
As Teardown/Build 4 & 5 are in Area 1-08, they will be discussed together. The time allotted for Teardown/Build 4 is four days. The time allotted for Teardown/Build 5 is three days. Similar to previous Teardowns/Builds certain workstations were not totally broken down (see Figures 26 & 27). The Manager stations along the south end of the area are configured to adhere to the workstation standards set by Westfield Group. Four employees in phase four are relocated to temporary workstations in different areas; three employees in phase four are transferred to their new workstations in Area 1-08; six employees in Build 5 are relocated to temporary workstations in different areas of the facility. Furniture installers were free to break down the entire area which sped up the process because they did not need to work around existing workstations. When all the panels were broken down and furniture moved to the staging space in Area 1-10 (refer to Figure 21), the Electricians set up power poles which run the electric to the workstations without any interference from working around existing workstations.

Once more, when the building of Build 4 & 5 was completed, the maintenance department moved employees scheduled to relocate into the new area layout, and IT connected each workstation to the network. Many employees who were relocated into the new layout in Area 1-08 (see Figure 27) were previously in Area 1-09 (see Figure 28) which is the location of Teardown 6. This enabled the Furniture Installers, Cable Technicians, Electricians, and the IT Department to begin disconnecting workstations in Teardown 6 of this Construction Move.
Figure 26 – Area 1-08 Teardown Four and Five. Workstations where broken down to make room for the new reconfiguration. The Manager workstations along the south window wall were not involved in the Construction Move project.
Figure 27 - Area 1-08 Build Four and Five. Reconfigured workstations shown. The Manager workstations along the south window wall were not involved in the Construction Move project.
Figure 28. Area 1-09 Teardown Six. This area was too large to teardown at one time so it was broken up into two phases refer to Figures 29 & 30.
Since Area 1-09 is a large area, the teardown and build was separated into two phases (refer to Figure 28). Teardown/Build 6 Phase 1 was allotted five days (see Figure 29 & 30). Teardown 6 phase 2 was allotted two days (see Figure 31).

Once Build 6 is completed, seven employees from the Claims Department who were scheduled to relocate to this area are moved first. This completed the Claims Department’s involvement in the Construction Move.

The next step in Area 1-09 is to move the Analytics Resource Center employees from the third floor to their permanent location. In order to accomplish this, existing furniture in Area 3-05 needs to be broken down and reassembled in the empty space of Area 1-09 which is Build 7 (see Figure 32).

During this Construction Move, furniture is broken down in areas that are targeted to be relocated and reused in other areas. This saves the expense of ordering new furniture and a great deal of time. Since the color scheme of the Analytics Resource Center department is not changed, it is logical to reuse existing equipment in the new layout. However, the entire area cannot be broken down due to the lack of temporary workstations to house the Analytics Resource Center employees. There are six vacant workstations in Area 3-05; these are disassembled and reassembled in Area 1-09 (refer to Figure 30). After the workstations are reassembled, six Analytics Resource Center employees who were scheduled to move into the new workstations are moved by the Maintenance Department.
Figure 29. Area 1-09 Teardown Six Phase 1. This area was too large to teardown at one time so it was broken up into two phases which this is the first phase. After the workstations were broken down the new reconfigurations was implemented as seen in figure #30.
Figure 30. Area 1-09 Build Six. This area needed to be built first whereas the rest of the claims department could move into their permanent workstations. After the build was complete the rest of Area 1-09 was torn down.
Figure 31. Area 1-09 Teardown Six Phase 2. This is the area where the ARC Department will reside.
Figure 32. Area 1-09 Build Seven. Area 1-09 corner is where the full-height demountable walls will be installed. The broken lines indicated where the full-height demountable walls will be located. The temporary Manager workstations will be broken down after the full-height demountable walls are installed.
This leaves six vacated workstations to be disassembled and moved to the first floor as well. This process of breaking down workstations and moving employees continued until the entire department was moved to the new location.

Not only did the Analytics Resource Center require a larger area, they also required full-height walled offices to be built on the east side of Area 1-09 (refer to Figure 32). These offices are for supervising managers. Temporary workstations are built for these managers. However, space is allocated for full-height walled offices to be built around the temporary Manager’s workstations. The broken lines in figure 32 indicate where the full-height walls will be built. After the full-height walls are installed, the workstation inside will be disassembled and removed. This saves time and frustration for the managers because it is not necessary to move supervisors to a temporary location while the walls are being built. This completes the Analytics Resource Center Department involvement in the Construction Move.

In Build 8 there was no need for a Teardown. Previously this area was used for staging office furniture so the space is already vacant. The timeline for the building of this space is two days because the space is vacant. This is an optimal situation because Furniture Installers do not have to work around existing workstations, which saves time. Twelve workstations are targeted to be built, eleven Clerical, and one Professional. It is very fortunate that the equipment needed to Build 8 is in inventory (see Figure 33).
Figure 33. Area 1-10 Build Eight: Work Flow Coordinators Department: previously the furniture staging area location. The Work Flow Coordinators Department was being built simultaneously with the Analytics Resource Center Department.

Figure 33. Area 1-10 Build Eight: Work Flow Coordinators Department: previously the furniture staging area location. The Work Flow Coordinators Department was being built simultaneously with the Analytics Resource Center Department.
The Maintenance Department and the IT Department moved the Work Flow Coordinators Department from Area 3-07 to Area 1-10. This completed the Work Flow Coordinators Department’s involvement of this *Construction Move*.

The last group involved in this *Construction Move* was the Resource Center. The Resource Center Department was located on the third floor of Westfield Group facility. They are responsible for training new employees for their duties in the insurance business. The Resource Center Department was to be relocating in Area 3-07 (see Figure 34), where the Work Flow Coordinators Department was previously located. The allotted time for Teardown 7 was one day; the allotted time for the Build is two days. Given that the Work Flow Coordinators Department and the Resource Center Department uses the same kind of workstations the furniture was reconfigured into a different arrangement (see Figure 35). This saved a great deal of time because the process set by Westfield Group was the same for both the Work Flow Coordinators and Resource Center Departments. The Resource Center Department needed a configuration that would promote team work, while the Work Flow Coordinators Department needed more privacy. The existing layout was transformed into a “bull pen” type of layout.

Each employee has free access to each other from a sitting position. This enabled employees to collaborate with short conversations from their workstations without interrupting their work. All employees from the Resource Center Department were relocated to their new area without incident.
Figure 34. Area 3-07 Teardown Seven. The Resource Center Department required the same workstations the Work Flow Coordinators were using. None of the furniture needed to be replaced just reconfigured into a “Bull Pen” type of configuration as seen in Figure 35.
Figure 35. Area 3-07 Build Nine. Resource Center Department. The Resource Center Department moved in the area where the Work Flow Coordinators Department was previously located.
Expectations

The *Construction Move* is the most complicated move of all of the moves discussed in this paper. Generally, when a *Construction Move* is warranted, it only involves one department. But this *Construction Move* involved four other departments located on different floors. As expected, when working with people, there are all kinds of issues. Everyone wants the spot by the window or the bigger workstation. This is where it is wise to have set standards in place. Westfield Group Workplace Design Department, as previously mentioned in this case study, uses a set process. This helped avoid conflicts that this project might have produced.

The secret to keeping everything organized is taking one section at a time; breaking the project up into different Teardowns/Builds and completing the move of that particular section before moving onto the next group. Though Hospitality Operations was a very complicated project, all phases were relocated without difficulty; which is testament to careful design and project coordination for a project of this magnitude.

As in all moves, Work and Move Order spreadsheets are issued. They were also issued in the Claims Department project similar to those of Hospitality Operations, and Small Business Accounts. Consequently, since the *Construction Move* was complicated in explanation, including work and move orders would add unnecessary complexity. For that reason, they were excluded from this case study.
CHAPTER VI

SPACEPLANNING GUIDELINE

For managing intra-office churn in limited office space, Westfield Group follows the most efficient and only process this writer has found. The two closest formulas for efficient moves were in J.K. Rayfield’s book “The Office Interior Design Guide” (Rayfield, 1994) and Steelcase’s booklet “More Work in Less Space” (Steelcase, 2012). These readings offered some insight into utilizing space efficiently but fell short on the criteria on how to move employees and equipment when dealing with limited space. As stated previously, the research findings of this case study have been examined in order to formulate a guide to space plan within limited office space. This “Spaceplanning Guideline” will present aspects for analysis of existing space and a framework with which to implement an efficient move. The Guideline adopts Westfield’s Workplace Design Department’s best practices and non-proprietary standards as the basis of the model. Using the Guideline, corporate facility planners, interior designers and office furniture manufacturers will be able to competently analyze, evaluate, and manage intra-office churn as applied to limited office space.

Westfield Group’s design process example influences this Spaceplanning Guideline greatly because of the firm’s well-developed and methodically executed projects. It is important when managing churn in limited spaces that one follows a solid
and time tested plan of action. This guide will be beneficial as it accommodates the various needs of small to large scale end-users.

When considering any disruption of employees, one must consider the requirements of the move. As previously noted, Westfield Group is a large corporation. In large corporations there are in-house departments to take care of the various needs, but not all corporations have that luxury. Smaller units must go outside the company and hire specialty firms to manage their intra-churn for them.

This is where a “Spaceplanning Guideline” will help those who need to manage churn but do not know the proper process. The key to a successful move is organization and communication. It is essential that the project lead keeps everyone involved and up-to-date on what is occurring in the project. The old adage “measure twice, cut once” is relevant as it pertains to communications during this process. When all parties are apprised of the process, it increases accuracy of action items, reduces lag time, and expedites problem resolution. Providing information on multiple forums, including corporate intranet and email, increases the knowledge and comfort level of the involved parties, resulting in increased satisfaction with the changes as well as adherence to time and financial constraints of the project. This guide will allow companies of all sizes to manage churn in limited office space in the most efficient and cost effective manner.
Spaceplanning Guideline

A. One must begin with an interview with the supervisor or contact person of the department that will be involved in the project. This will determine how intensive the project will be. Also one needs to determine how many people will be involved in the transformation of their work area.

B. A space assessment and site field measurements are required of the targeted space. These two tasks are necessary for the accuracy of the Cad drawings. These drawings are instrumental in the successful implementation of the entire project. After the preparation of the CAD drawings, a meeting is arranged with the supervisor/contact person to review them and fine tune anything that needs to be changed. It is very rare that drawings are correct and accepted at the first draft. But this stage is very important because this is where everything is discussed and worked out before any changes are made to the employees’ workstations.

C. Once the drawings are accepted by the department supervisor/contact person, the planning stage starts. An inventory of required equipment/furniture is compiled. The inventory of existing equipment/furniture is compared to the drawings of required equipment/furniture and whatever is needed is ordered from the furniture manufacturer.

D. When dealing with an average company, a company employing 50 – 100 people, extravagant employee movement spreadsheets are hardly necessary. The list may not be as long as some of the examples in this case study but it serves a purpose
so that when it comes to executing the project, all employees will receive move orders explaining the date and time each will be moved to their new workstation.

E. When the equipment/furniture is delivered, the Furniture Installers, Maintenance Department, Electricians, IT Technicians, receive the move and work orders showing the stages of the project and what their responsibilities are at what stage.
It is common for average companies to hire this work out to sub-contractors.

F. It is crucial that the timetable of events goes as scheduled. Each phase of the move relies on the previous phase to stay on schedule. It is possible for a move to be completed without any difficulties, but unrealistic because when dealing with humans, there are often unforeseen circumstances and last minute emergencies.
When planning, expect some disruptions. Create alternative plans use them in a calm and rational manner, which will allow clearer direction, and expedited resolution.

G. The individual performing the duty of implementing the project process is also responsible for completing the project. In a word, tying up loose ends. When the move has been completed, a walk-through is in order. This is where the lead person on the project goes over the project area and records any missing parts. The list that is compiled is called a punch list. The punch list is given to the maintenance department or another responsible party and they revisit the workstations and replace the missing parts.
CHAPTER VII
SUMMARY

As noted in this study, office layouts are subject to frequent changes, either to create space for new employees, or to reuse space from employees moved to a different area, or to accommodate changes in job functions or area of responsibility. This process has the potential to drastically impact business, either by improving operations or by creating obstacles if executed poorly. Managing intra-office churn in limited space is related to competent space planning of office furniture and requires employees with the foresight to create an area that may be reconfigured for additional employees without expanding the area,

This case study discussed three moves with the same process used in each. Although each project was different in size, the same process was used to insure that all expectations were met. As noted, there are three kinds of moves in Westfield Group’s operations. In Box Moves employees move to existing workspaces, this involves relocating files and supplies, not furniture or power and data cabling. Furniture Moves represent a higher level of complexity, with reconfiguration of existing furniture or addition of new furnishings, and minimal changes to cabling. The most multifaceted classification is Construction Moves which include new permanent walls, additional wiring for power and data, as well as new or additional furnishings.
This case study documented procedures that ensure quick and efficient movement of employees to minimize down time. Departmental processes are streamlined and logical, adding to the efficiency of work while minimizing inconveniences and frustration of employees. The Westfield Group’s intra-office churn process is vital to the efficiency of the entire company. Managing churn in the work place is primarily about eliminating costly down time. Down time contributes to loss of revenue. When it is impossible to eliminate down time, the best that can be done is to mitigate the lost productivity as much as possible.

The Workplace Design Department of Westfield Group has done an excellent job with the little to no amount of down time in any given project when dealing with limited office space. Conducting a move, regardless of the size, would be uneventful if space was in abundance. Contrary to adding more real estate to the existing building or by building a new facility, the best way is to be organized and efficient when managing workplace churn.

The way the Workplace Design Department managed intra-office churn was very positive in every way involving staff, facility planners, and interior designers. All details of the respective moves were worked out before informing the employees. This was vital because people tend to get excited and question everything and it is wise to have the answers before the questions are asked. In addition, one person was in charge of each of the three moves. This helped keep everything organized and running smoothly. As the old adage states “too many cooks spoil the soup.” Too many managers can impede
smooth transition. The standard for managing intra-office churn is the cornerstone of Westfield Group’s success in keeping every move effective.

Even though Westfield Group has seemingly made managing intra-office churn in limited space a science, there is still room for improvement. Issues occurred during this study that was not addressed until it affected the process of the move. For example, during the *Box Move* the Small Business Accounts several employees neglected to inform the Workplace Design Department that they would like to have keyboard trays installed in their new workstations. Maintenance did not know this until they moved the certain employees. Then had to stop and retrieve keyboard trays from the warehouse. This produced unexpected down time which could have been avoided by clearer communications between the supervisor and employees of the department.

The issues that transpired during this study were small and inconsequential to the success of the moves, mostly consisting of miscommunication between the employees/supervisor and the Workplace Design Department before the move commenced. In these instances one must take the view of learning by experience, and making sure communications are improved in the next move.
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1. Build - The assembling of system furniture and networking during a Furniture or Construction Move.

2. Bull Pen Layout – Bullpen office design is based on the open space where frequent communication is necessary and privacy is unnecessary. The layout was developed when the only way to communicate was to talk directly.

3. CAD – Computer Aided Drawing software. This software is used to do 2-D construction drawings of the floorplans and elevations of the targeted area.

4. Down Time – time during which production is stopped especially during setup for an operation or when making repairs

5. Field Measure – Physically measuring on site the targeted area to ensure proper dimensions for the CAD drawings.

6. IT Department (Information Technology) – The department that is responsible for all the cabling and network hook ups.

7. In-House – within, conducted within, or utilizing an organization's own staff or resources rather than external or non-staff facilities.

8. Layout – The configuration of system furniture.
9. Move Order – A spreadsheet with instructions explaining the responsibilities of each employee involved with the move.

10. Power Pole – Poles that extends from the ceiling carrying electricity and networking cables. Enables the designer the freedom to float layouts without the constraints of being near a wall.

11. Punch List – A list of items compiled after the finish of a project. It is common to overlook items in a furniture reconfiguration. Punch list items are corrected after a project is done.

12. Pull List – A list of items needed to be extracted from the furniture inventory.

13. Short List – A small list of names.


15. Teardown – The disassembling of system furniture and networking during a Furniture or Construction Move.

16. Timeline – The amount of time given to accomplish a project.

17. Walk-through – an exercise after the project has been completed where the lead on the project examines the systems furniture to evaluate if all the pieces and parts that are required are in fact there.

18. Work Order – A spreadsheet with instructions issued to the Maintenance Department, Cable Techs, IT, Furniture Installers explaining the work responsibilities of each department.

19. Workstation – an area with equipment for the performance of a specialized task usually by a single individual.