

Moving and Integrating:

A

Scientific Approach

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The Setting

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Learning Objectives:

Upon completion of this session, participants will be able to:

- 1. Create documentation to conduct their own moves
- 2. Explain many of the challenges that occur in a relocation
- 3. Integrate files from different systems
- 4. Plan and conduct a high quality, efficient, and successful move

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Setting the Stage...

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Tasks

- Create a new records department made up of a legacy department and others who had worked in legal departments.
- Create a temporary records center in the leased space across the street.
- Identify the unidentified materials.
- Put the files in order.
- Identify and archive inactive materials.
- Train new records team members on software and process.

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Tasks Continued...

- Design and build a records center somewhere in the area.
- Plan the relocation of records from the Clayton office to the lease space.
- Plan the relocation of records from the lease space into the records center.
- Plan the move of records from downtown to the records center.
- Map all of the files to determine shelf space allocation.

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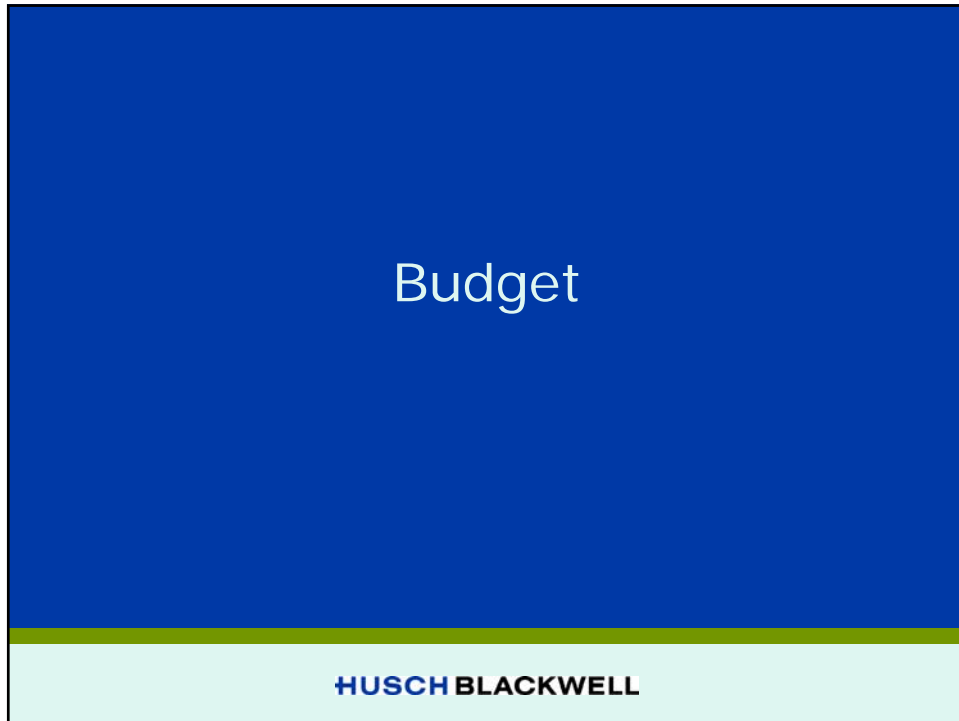
Get it Done with Project Planning

- I. Get a written scope of work.
- II. Analyze your needs and resources
- III. Prepare a budget.
- IV. Develop a communication plan.
- V. Build a project plan

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Assembling the Team

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Budget

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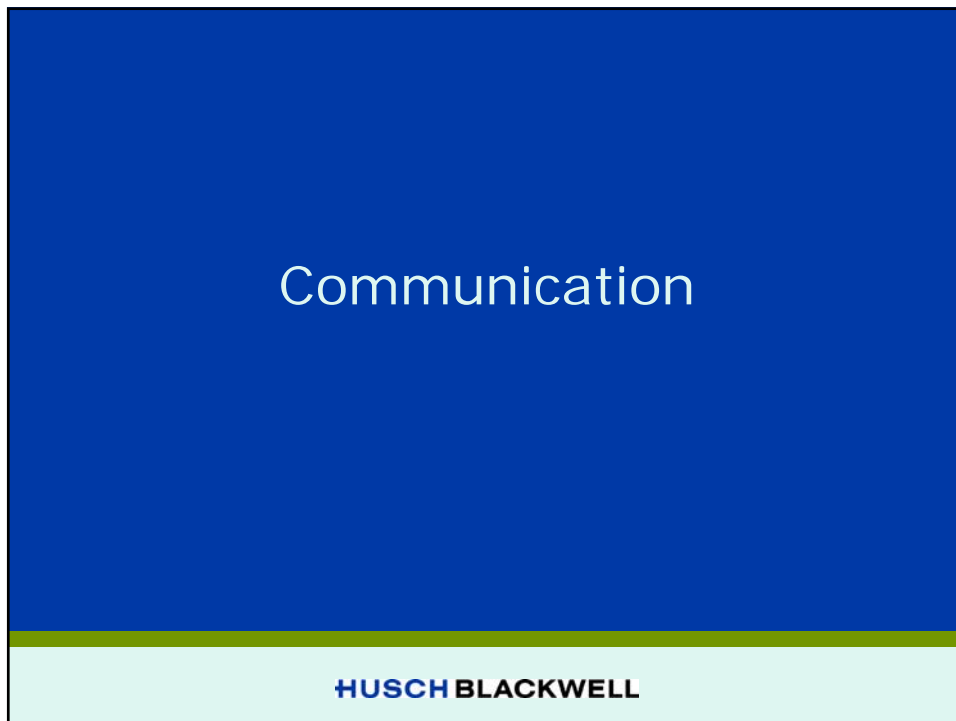







Logistics

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Client Range	Linear Feet	Current Location
60884	60	11
400000-400999	10	Corp/Lit
40000-405360	12.25	R.E.
401000-405999	3.5	3 rd
401000-409999	12	Corp/Lit
401335	3.5	T & E

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ID		Task Name	Duration	Start	Finish
1		Clayton	124.13 days	Thu 2/26/09	Fri 7/31/09
2	✓	Determine Place for Clayton Files in Inter	5 days	Mon 4/13/09	Fri 4/17/09
3	✓	Measure LFI of 8th floor in Hanley	5 days	Mon 4/13/09	Fri 4/17/09
4	✓	Verify that 3rd floor is available for our u:	1 day	Wed 4/15/09	Wed 4/15/09
5		Identify Materials	96 days	Thu 2/26/09	Fri 6/26/09
6	✓	Identify where all materials are - floorplai	2 days	Thu 4/2/09	Fri 4/3/09
7	✓	Obtain practice area support for identific	23 days	Thu 4/2/09	Thu 4/30/09
8		Identify letter v. legal files	96 days	Thu 2/26/09	Fri 6/26/09
9		Identify and Isolate boxes	5 days	Fri 5/22/09	Fri 5/29/09
10		Identify and label unmarked materials	72 days	Fri 3/27/09	Fri 6/26/09
11		Identify Files on 12th floor	21 days	Tue 5/26/09	Fri 6/19/09
12		Identify Files on 11th Floor	20 days	Tue 5/26/09	Thu 6/18/09

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Summing it Up

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Case Study

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Solution 1

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How many feet of files does each office currently have?

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What is moving?

- Identify what items need to be in Records area, measure the LFI, container count, specimens, exhibits, etc.
- Is this material indexed in an RMS or other places?
- What can be archived?

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- Identify (on a map) where these materials are
- How are the records arranged in each office?
- Are there records that need special security?
- Is there expected company growth in the next 5 years

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Where is it moving to?

- Floor plan for work space
- This includes shelving, workstations & dynamic workspace

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What is the time schedule?

- When does office construction start?
- When will the centralized records area be complete?

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What is the budget for the project?

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Where will records will be temporarily staged?

- Who will move these materials?
- Does shelving need to be built to stage the materials, or can you use carts?
- For how long do the materials need to be staged?

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Do employees need to be temporarily moved?

- Do workstations need to be set up?
- Does area need supplies, amenities, etc.?

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Solution 2

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How many LF of shelving is needed for the new Records Center?

- 12,900 feet of files, plus 15% for space adjustment / growth = 15,177 feet of shelving for active files
- 700 boxes, plus 15% = 805 feet of box shelving
- Remember, this is an active records environment - materials grow, shrink, and are dynamic.

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What types of areas and product will you need to hold the various types of materials in the Records Center?

- Active file shelving, box storage, secured storage for files, secured storage for products.
- High density mobile shelving if possible.
- Box shelving.
- Additional security equipment (magnetic badges, security cameras, limited-access locks).

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Determine what indexing system will be used to order the files.

- Numerically, following MFI's system.

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Develop a general project plan listing action items to complete by May 1.

- Determine how much labor is needed for project & seek approval for OT / additional resources if needed.
- Put together and send RFP's for shelving & movers as soon as possible.
- Archive inactive files.
- Index JS files, in RMS if possible. If not, then label files physically.

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- Determine what files can be staged on 3rd floor, find additional staging space and / or number of carts needed to stage remaining files.
- Begin mapping of files.
- Develop training schedule for JS employees.

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Develop the questions that need to be answered to complete the project plan.

- Do all file spaces on all floors in the JS office need to be vacated by May 1?
- Is there extra space on 3rd floor for temporary storage or to stage carts? If so, is there money available for these solutions?
- Which parts of the build-out will be overseen by the Facilities department, and for which parts will the Records Manager be responsible?

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Solution 3

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Topics need to be communicated to the JS employees:

- MFS is adopting the MFI Records program
- Move dates
- Build-out dates
- Description of Records program including:
organization, staffing, service agreements
- Benefits of program
- RMS training schedule
- Location of Records during construction
- Expectations
- Request for support and patience

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Communicate with key JS personnel first

Department heads - to garner support and ensure employee compliance

Key players - additional buy-in

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Communicate immediately

Communication should continue as needed, specifically when employees will be impacted by upcoming construction or file moves. Communication should also take place after file moves have been completed.

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Communication with MFI:

- MFS is adopting the MFI Records program
- Move dates
- Layout of new Records Center
- Daily Records support will continue through the move
- Request for support and patience

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Methods of communication:

- In-person meetings with Department heads & key players
- In-person meetings with other department members as necessary
- Email communication for dates and updates
- Hard copy communication as needed

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What is your contingency with JS employees who will not comply with the plans?

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What is your contingency with JS employees who will not comply with the plans?

Keep upper management informed of these employees, provide alternative solutions, and work with upper management to determine the best decision for the company going forward.

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Solution 4

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1. How many carts do you need to rent?

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2. What action items need to be listed in your Project Plan for the staging period?

- Which material do you first move to the 3rd floor?
 - Those materials that are in areas which will be built-out sooner
 - Other candidates for first removal include - smallest areas, most organized areas, departments that volunteer or seem interested in new program.

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Determine the level of access to the files JS employees will have during business hours, and after business hours.

- JS employees will need basically the same type of access they had before. However, it can be provided by others. If they had 9-5 access before, the Records staff will need to be able to deliver files during these same times.
- Let essential personnel know how to retrieve files after hours.

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Which pieces of the move must you coordinate with other departments?

- Coordination of the freight elevator with the building / Facilities Department

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- Will the Facilities / Building Department be in charge of construction supervision in the new Records Center? Including, but not limited to paint, carpet, workstation, furniture.
- If construction will start and end in one area before moving to another, how will that affect your timeline.

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How long will moving the files from their current areas to the third floor take?

- Do time studies before you begin moving to get an idea of how much time you should schedule the move company. The moving company can also supply these numbers for you. During your first move, carefully watch the time and the variables, to make even more educated guesses for the rest of the move.

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How will you get the material in order?

- Once your material is all on the 3rd floor, you have a couple of options. You can organize each department into the numerical order you desire. If possible combine all department materials into one numerical set before movement into the Records Center. If not possible, you can integrate several numerical sets as you move the materials into the Records Center.

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How much flexibility do you have in your time table?

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How will you map the files to their final locations in the Records Center?

- Once the files are in some sort of numerical order, measure ranges of files. The ranges may change from department to department.

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3. What departments / people are involved in the weekly meetings?

- Facilities, IT, General Office Services, building engineers, contractor, shelving vendor, installer

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4. What action items from other departments might affect your Records Project Plan?

- Department moves
- Construction dates
- Product delays
- Pending projects / hot case materials
- Deadlines
- Freight elevators

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Questions and Answers

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Thank You

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