

Moving Your Healthcare Organization – Eight Strategies to Ensure Your Move Runs Smoothly



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Making a move in the best of times is difficult. For medical practices, clinics and hospitals already challenged by our changing healthcare landscape, planning for a move or transition takes specialized skills and experience. By selecting an appropriate manager for the project, identifying and engaging appropriate stakeholders, and having a well-designed strategic transition plan, you'll have a great opportunity to come out a hero — and not the victim of unforeseen circumstances.

The following checklist is designed to help you develop and earn acceptance for your transition plan, avoid common pitfalls, and prepare your healthcare organization for a successful move.

1. Select the Right Person to Lead the Charge

The most important decision you have to make is who is ultimately responsible for planning and executing your move. Often, organizations look internally for someone who is available and willing to do the job. That person may either lack sufficient experience or have work obligations that will make it difficult to provide good follow-through.

Can your internal candidates answer yes to the following questions?

- Have you planned a major move in the past for a medical practice or hospital?
- Do you have a strong background in budget development?
- Do you have experience dealing with all the stakeholders and agencies that may be affected by this move?
- Do you have the bandwidth to manage this project?

If they don't have this expertise, or if you expect the move to take a period of months or even years, you may want to hire an experienced project manager to ensure the entire process — from planning through execution — runs smoothly. Or, it may be most cost-effective to hire a professional consultant to work with an internal coordinator who specializes in managing moves for healthcare organizations — someone with the experience and personality to coordinate all the appropriate stakeholders.

2. Identify Departments Impacted By the Move/Transition

If you are moving to a new location, every department will be affected to some extent. When you are relocating departments within an existing location, you may only need to deal with the members of those departments, such as ER doctors and staff or admissions personnel. But even with intra-office moves, some departments, such as IT and Finance, will need to get involved in the process. You'll want the Finance Department's support for such things as budget approvals and payments. IT will need to be on hand to install or reconfigure computer systems and equipment.

Do your due diligence up front to capture all dependencies and risks for each department that will be impacted directly or indirectly.

3. Identify and Engage All Stakeholders

Develop a stakeholder analysis to determine who will participate, at any level, in your move. Create a governance model and elect individuals in each department, or external organization, who can make both strategic and funding decisions on behalf of the organization. This will help you avoid confusion when you're in the middle of moving.

Common stakeholders for healthcare organizations include:

- **C-suite:** Determine who has the ultimate power to approve your transition plan or changes to it. Is the primary driver schedule or budget? It is important to understand key motivations and communicate them clearly in order to achieve the best outcome.
- **Legal:** Determine how long it will take to get legal review of new (or changes to) business agreements or licenses, independent contractor contracts, provider contracts, building leases, site surveys (licensing), provider credentialing changes, and anything else that requires counsel.
- **OSHPD:** Be sure that you're aware of the latest OSHPD requirements to ensure that your new environment meets state-mandated health care facilities guidelines.
- **Corporate Strategy:** Discuss what corporate directives may be affected by the cost of the move. For example, the development of the patient market, provider recruitment, or leased versus purchased buildings.
- **IT:** Partner with IT to determine whether the transition will involve a change in communications systems, networking services, or equipment, and the impact of the changeover to workflow. Set up scheduling to ensure IT has adequate staff available to support your technology needs.
- **HR:** Work with HR to determine if your move will require additional staffing or involve downsizing. Ensure they have a plan to create training programs for the medical and support staff and that, if you're working with union staff, you allow adequate lead times. You may also need to work with HR to develop mediation plans for potential conflicts that occur during the move process.
- **Facilities:** Make the organization's project manager for construction a key partner in your move. He or she is instrumental in insuring that operational planning is in sync with construction planning.
- **Finance:** Working with the finance department, create a funding plan that serves as a guideline for all financial decisions related to the transition. Determine who will monitor the budget and handle reporting. Set up a payment system to ensure that bills are paid in a timely manner and the process is never held up due to insufficient funding.
- **External Participants:** If your transition involves exterior or interior architecture and construction, it's especially important to anticipate setbacks that can affect your move-in date and build contingencies into your plan. Determine who is responsible for interacting with the **construction and architectural firms** and who in the firms are your primary contacts. Contact your **local planning commission** to find out how long permit approvals will take to secure. Form alliances with your **local utility companies** and set up timetables for installation services. Learn exactly how long it will take from the time your new space is completed to getting all services turned on. Hold routine meetings to ensure deadlines are met and assess any risks.

4. Prepare a Communications Plan

Throughout your transition, you will need to communicate across all departments, keeping management, employees, suppliers, and contractors informed and aware of the roles they each need to play and the activities

they need to complete to make the transition go smoothly. Additionally, develop and time external communications to keep customers/patients informed about the move and where they need to go. Establish regular transition meetings with key stakeholders to ensure that everyone remains on the same page. Your top-level communication plan needs to include the following:

- Internal and external communications plans
- Appropriate messaging for each audience
- Timetable for information dissemination
- Mailing list updates

5. Align Finance with Strategic Direction

The cost of your move may affect the strategic direction of your organization or departments within the organization. Future needs may have to be postponed until the move has been fully funded.

- Always prepare for contingencies, including delays or unexpected costs such as early termination fees with vendors.
- Conduct a sensitivity analysis to understand the impact to your budget in case of unforeseen circumstances.
- Monitor and revise your estimates often to ensure your project is on-track.
- Ensure you have a payment system in place to ensure that vendors are paid in a timely manner and late payments don't hold up your transition process.

6. End-to-End Planning

Plan for all activities impacting your move and the time and cost required for each activity. Once a budget has been developed, determine which department's budget covers the costs. Common considerations include:

- **Availability:** If the move date is contingent on the completion of construction, be aware that prior to move in, permits must be obtained, utilities turned on, and also medical personnel must be trained before the final move.
- Purchasing of materials and equipment
- A complete inventory of all systems and equipment
- The cost of the move itself (including the mover, packing materials, a move manager)
- Set up of furnishings, IT systems (e.g., network, desktops, software, and phones) and electronics (e.g., PA system, TVs in hospital rooms)
- Interior decorating
- Costs associated with communications (e.g, mailings, posters, graphic design, and printing of materials)
- Costs associated with moving hospital patients from one facility to the other.

7. Create a Realistic Project Plan

When planning your move, it's critical you have all your stakeholders' full understanding and acceptance of the business rationale for making the move. There may be unforeseen disruptions along the way. Keeping everyone's focus on the goal and having shared communication will help mediate complaints and conflicts.

Your project plan should address the following questions:

- What is your timeline for moving into the new facility or space in your existing location?
- What key initiatives are in progress that could potentially impact your timeline (i.e. cut over of EHR, HIPAA compliance, approvals dependent on external organizations such as the state)?
- What holidays, events, vacation times, and other activities might impact the timeline?
- Working from ideal deadlines, what needs to happen when?
- What risks have you identified and what mitigation strategies do you have in place should they occur?
- What is your contingency plan if timelines are not met?

8. Prepare to mediate

Conflicts are almost inevitable with a large transition. Things rarely go exactly as planned, so flexibility is key. When a dispute can't be resolved quickly, it helps to have a good mediation plan in place.

With your comprehensive transition plan approved and in place, you're ready to begin executing your move. Schedule a meeting with your stakeholders, review what needs to be completed when, and plan to make it happen. Be ready to make adjustments throughout the process, as with any move adaptability is important. While it may not make the move fun, it can certainly make it less stressful.