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Finch, E

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Authors	Finch, E
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Change Management and Relocation: a moving experience

Edward Finch

University of Salford, UK
| e-mail: E.Finch@salford.ac.uk |

ABSTRACT

Organizational change brings with it a need for facilities changes. Merging, splitting, downsizing, upsizing, adaptations, are all physical manifestations of the need for change. Along with these changes are innumerable human and organizational changes that are often unintended and poorly understood. The purpose of this paper is to explore what the wider literature has to say about these secondary effects. Specifically, we consider the displacement and fracturing of established modes of operation embedded in previously occupied buildings and the formation of new modes of operation. The paper considers the application of 'griefwork' initially proposed by Kubler-Ross in the 1950s. Such an approach provides a means to understand physical change. Furthermore, in the following analysis we consider research currently being undertaken at MediacityUK to trace the transition experiences of those impacted by a major facility change across a split-site. The research findings will provide insights concerning architectural and facilities management interventions that can significantly reduce the human and organizational cost of change, which though difficult to measure, have a profound effect on the sustainability of an organization.

1 INTRODUCTION

The work of Toffler (1970) foretold the increasing acceleration of change. What was unique about the work is that it went beyond simple technological forecasting, extending to a discussion on the impact on the human condition. As facilities designer and managers, built environment professionals have an obligation to address such effects. No more so than today, the frequency of facilities changes are in evidence, as are the effects of such changes on the human condition and the wellbeing of organizations. Changes designed to improve an organization can in fact undermine it. In this paper we consider what the existing literature has to say about the relocation process and the organizational impact. Our assumptions that 'new' is necessarily better is perhaps ill founded. That is not to suggest that major real estate changes are not frequently required to reflect both internal and organizational changes. However, it is argued that the retention of elements of the past may be justified and should be reflected in architectural design and facilities management. Furthermore, by understanding an organizations past *modus operandi* we can not only provide a 'good fit' with a new solution, but also provide a 'transitioning' process.

In this paper we explore extant literature relating to coping with change in the workplace. Building on relevant theories and findings from this review, a framework is then used to analyse in-depth, how one organization has coped with a relocation process, both individually and organisationally. The paper begins by contextualizing the problems associated with the relocation process.

2 RELOCATION AND CHURN

The consultation and decision-making process surrounding relocation and churn remains highly contentious. Attempts by organizations to merge, downsize, upsize or centralize are often based on easily measurable factors such as logistics, closeness to market, organizational alignment and real estate. The human costs are, in contrast, difficult to measure, but nevertheless have a significant cost consequence for the organization and the individual. The radical changes experienced by the National Health Service in Scotland are not atypical of a much wider global upheaval. In a 'response to the Scottish Parliament Finance Committee' prepared by a UK trade union UNISON regarding the Scottish Executives relocation policy a number of concerns were expressed:

"... the human aspects of relocation have failed to be taken into proper consideration by those preparing the business case papers recommending relocation."

In terms of the practical implications of relocations, the direct impact on employees' families are clearly stated in the report:

"Relocation has left many employees with the stark choice of either resigning their positions or being forced to move away from families and friend"

Relocations invariably are entwined with the 'toxic' nature of organizational changes. Centralisation is one such approach, prompted by attempts to rationalize processes and real estate:

" We are opposed to the centralisation of shared services. These will, in most cases, require major organisational change, with new sites, new systems, and significant relocation and redundancy of staff."

A final point emerging from the UNISON report is the overwhelming burden placed on employees in a relocation process, in addition to the day-to-day pressures of work:

“UNISON Scotland is also concerned that staff involved in delivering shared services will be under considerable pressure to meet customer expectations, in most cases with no additional resources. Our concern is that this will lead to stress issues and have an overall negative impact on staff morale.”

These concerns mirror those of many employees and (in relation to retention - those of employers) throughout the modern world. The opaqueness of relocation decisions remains a largely unresolved issue. However, it is suggested that various interventions might be employed by architects and facilities management professionals to alleviate the stress and negative impact of relocation. Suffice to say, unlike built environment professionals, new incumbents of buildings do not necessarily share the same enthusiasm for having a ‘nice new’ building. The move has often come at a cost in terms of family commitments, added workload, and loss of something that may have been valued. Whilst this paper does not attempt to deal with the former issues regarding decision making transparency, it is hoped that it can redress the argument regarding human costs.

Having put the problem of relocation in context, we now consider current knowledge regarding our natural tendency for rootedness and resistance to physical moves. We then go on to examine how enforced change in the form of a relocation, necessitates consequent personal changes. These changes take the form of unlearning and relearning. Such a process is not only a cognitive challenge but perhaps more importantly, represents an emotional challenge. Part of this process involves a ‘letting go’ of previous place attachments. Associated with this experience are many cultural, procedural and management approaches that are closely entwined with the ‘old’ and ‘new’ environment. To move, our human need for grief (including many forms of organizational ‘letting go’) and our acceptance of the new. A final outcome of this analysis is the description of a case study approach that will be used to capture the ‘move experience’ as described by a number of stages. Such an analysis will be based on a grounded approach, using the data as a basis for the generation of an appropriate theory.

3 PLACE ATTACHMENT

Before considering the effects of change, it is instructive to first consider the existing inertia embedded in an organization. This inertia may reflect an entirely rational or defensible emotional position regarding the space employees previously occupied. Having some measure of the extent and nature of this resistance or rootedness could provide a basis - not to overcome such ‘obstacles’ - but to retain where possible, the positive elements.

As noted by Goksenin and Finch (2011) the symbolism associated with place is a powerful force that works against locational flexibility. Stegmeier (2008) argues that many organisations attempts to implement new workplace strategies have failed due to overwhelming employee resistance to change. This argument has been supported by Edwards (2010) and Knight & Haslam (2010a, 2010b).

A person’s relationship with their own physical environment is ingrained, subliminal and often difficult to understand. The nature of this relationship is essentially emotional. In contrast to research on the *expression* of emotion which has been extensively studied, Briner and Totterdell(2002) suggest that research on the *experience* of emotion is relatively underdeveloped. Despite recent interest concerning the workplace and its influence, little is known about the emotional significance of the physical environment for employees.

Hidalgo and Hernã Ndez (2001) suggested that current work on place attachment is limited to particular spatial environments – often focussing on the emotional level and largely in relation to the home environment. Their study considered the significance of place

attachment at the city, neighbourhood and house level and addressed both the physical and emotional dimensions. Among the results, they highlighted that: 1) attachment to neighbourhood is the weakest; 2) social attachment is greater than physical attachment; and 3) the degree of attachment varies with age and sex.

Place attachment, is defined as one's emotional or affective ties to a place, and is generally thought to be the result of a long-term connection with a certain environment (Altman and Low, 1992). This phenomenon is fundamentally distinct from the initial emotional response to an environment that reflects its aesthetic qualities. Thus, one can have an emotional response to a beautiful (or unattractive) office environment, but such a response may not be a deeply felt emotion. Public spaces such as museums or railway stations may solely engender such a response, because of the temporary nature of the engagement with the particular environment. Schroeder (1991) labeled this distinction as "meaning versus preference" such that "meaning" describes the "the thoughts, feelings, memories and interpretations evoked by a landscape"; whereas "preference" describes "the degree of liking for one landscape (e.g. hospital ward or classroom) compared to another". An enduring relationship with a place is usually required in order to develop a deeper and lasting emotional attachment – such that *meaning* is established.

Stedman (2002) considers place attachment as being a subsidiary element of an associated concept 'sense-of-place' (SOP). He considered both 1) place satisfaction (equivalent to Schroeder's idea of preferences), conceptualized as an attitude toward a setting, and 2) [place] attachment, conceptualized as personal identification with a setting. Stedman (2002) goes on to suggest that, attachment, satisfaction, and meanings each have independent effects on people's propensity to engage in behaviors that sustain or improve valued attributes of the setting.

Having identified the significance of emotional attachment to place which arises from a lasting engagement, this paper now considers what happens when such an attachment is broken. We also consider what takes the place of the lost attachment. This takes the form of emerging emotional attachments and relearning in relation to new workplaces, work settings or facilities. This progression regarding detachment and subsequent attachment to a new environment is considered in terms of an emotional journey. This runs in parallel with the logistics and organizational maneuvering that is the physical relocation that is more familiar territory for the facilities manager.

4 PLACE AND 'LETTING GO'

Having considered the concept of place attachment, this paper now considers what happens when that rootedness is disrupted: when we lose our familiar place. As observed by Jeffrey (1995):

"For many employees it is as if they have slipped through a crack in the universe and no longer recognize where or who they are. What was once a secure home-away-from-home has become a frightening, unfriendly and even hostile workplace."

Jeffreys (1995) goes on to argue that embracing the 'new' is not the only problem, but leaving the old culture behind in what he describes as workplace grief.

The resulting negative attitudes have been discussed by Inhanan and Finch (2011) and Topchik (2011) who suggests that as much as \$3 billion is lost every year because of the effects of employee behaviours towards workplace changes.

The work of Mulligan (2003) based on an ethnographic study of a coffee house argued for the inclusion of the following principles to address the concerns of those affected by a move and dealing with the resulting grief:

- “(1) recognition of employee feelings of loss and legitimization of employee nostalgia for the old site,
- (2) better managerial communication with employees prior to and after the move,
- (3) the holding of parting ceremonies at the time of the move,
- (4) memorializing and preserving artifacts from the old site, and
- (5) reinforcing and/or re-establishing organizational patterns and rules disrupted due to the move.”.

5 PLACE AND LEARNING: EMBRACING THE NEW

The replacement of old habits, practices and ways of doing things is a necessary, if often uncomfortable process. Moreover, it is intractably linked to the challenges of the new physical setting (whether intended or unintended). Some insight into this process can be found in the broader literature relating to experiential learning. Foremost in this respect is that of Gestalt psychology (Nevis, 1987) which suggests that day to day incidents and moments tend to move into the foreground of a person’s attention, which in turn prompts individuals to act on these incidents with a final process of resolution. Furthermore, in the Gestalt perspective, a sequence of sensations can be identified which are described as the ‘cycle of experiencing’. This sequence takes the form:

Sensation → Awareness → Energy Mobilisation → Contact → Resolution → Withdrawal of attention

In the context of relocations and churn, such stages might be associated with a) alerting employees of the need for the move; b) engaging in dialogue regarding the nature and implementation of the move (pre-occupancy evaluation) ; c) mobilizing activities (including planning and the physical move itself); d) the encounter with the new environment; e) resolution either by a planned process of *post occupancy evaluation* or unplanned emergent ‘fixing to suit’; f) period of stabilization when scrutiny of the move consequences are no longer required. In reality, withdrawal of attention may never occur in the face of continued changes which typify modern work environments.

Developing on the theme of experiential learning, the seminal work of Kolb (1984) described an experiential learning cycle. This highlights the differing learning approaches apparent amongst individuals and proposes the use of differing learning strategies appropriate to the learning style of the individual. Bateson (1973), instead of focusing on the different forms of learning as used by Kolb, looked instead at the various levels of learning that can be said to occur:

- Level Zero - Instinctive, habitual and routine behaviours
- Level One - Corrective changes and improvements (conscious ‘single loop’ learning)
- Level Two – Changing of familiar patterns and developing additional sets of alternatives (double loop learning)
- Level Three – ‘Frame breaking’ involves challenging the existing set of alternatives from which choices are made.

Level Three learning is what Juch (1983) describes as a process that culminates in a ‘holistic consciousness of self in and with one’s environment’.

The type of learning process observable in moves and relocations has been largely under-researched. Such processes might include low level learning such as returning to territorial workplace habits in a new open plan environment (Level Zero); reconfiguration of workplace

and team setting (Level One); introduction of a new activity setting to accommodate new working practices (Level Two); adoption of a wholly new way of working at the individual or organizational level (Level Three). Notice this learning process can take place at the individual or organizational level, may be encouraged or inhibited by the organization itself and may require planned intervention by the facilities manager. It might also be suggested that during the 'bedding down' of occupants in a new facility, learning is initially restricted to the lower level instinctive responses, but through time, higher order learning concerned with challenging the initial solution, may prevail. The extent to which the learning process undergone by building users is acted upon or restricted by the facilities management policy, may vary. Standards may seek to limit such evolutionary change, whilst post occupancy reviews may help to formalize and institutionalize learning in relation to workplace design.

6 PLACE TRANSITION

How do employees deal with letting go of the old and accepting the new? A significant amount of modern day change management literature has suggested that such a process involves multiple stages. Indeed, the idea of bypassing these stages by enforcing change, only serves to delay an inevitable emotional voyage which needs to be undergone (both at the individual and organizational level. Most of understanding of the change process derives from the seminal work of Kubler-Ross (1972) on bereavement, in what is now referred to as 'griefwork'.

In the griefwork model concerned with coping with dying, she interviewed more than 500 dying patients. The model, based on a grounded approach, identified five discrete stages, a process by which people cope and deal with grief and tragedy, especially when diagnosed with a terminal illness or experience a catastrophic loss. This model identifies several phases through which individuals pass, when coping with trauma or a serious illness:

1. denial
2. anger
3. bargaining
4. depression; and
5. acceptance.

The griefwork model has today received much wider acceptance as a basis for understanding organizational change and individual changes involving upheaval or trauma. Indeed, the phenomenon of grieving has been largely acknowledged as an important phenomenon, even when there is the promise of improvement (i.e. new facilities, new functionalities).

The work of Elrod and Tippett (1999) extends the 'griefwork' model to *organisational* change and shows experimentally, that the performance 'dip' associated with the implementation of organisational change is measurable. Two survey instruments were used to assess the performance of diverse multidisciplinary teams in the studies (similar instruments will be used for the proposed study). The work of Campbell and Finch (2004) and Inalhan and Finch (2004) highlight the significant role of organisational justice and place attachment respectively, as key modifiers in the transition process and will form part of the investigative study.

7 INDEPTH STUDY

Based on the preceding discussion on the acceptance of the 'new' (including grieving and relearning) we now consider a case study that uniquely tracks the observable transitions of managers affected by relocations. This is based on a grounded approach using a modern-

day adaptation of the Kubler-Ross five stage model. The research, funded by the Leadership Foundation in Higher Education (UK), began in 2011 and is currently being undertaken at the University of Salford. The purpose of the study is to:

The objectives of the research are:

- To evaluate the transition stages of individuals and working groups affected by a move from a conventional to an 'incubator' type learning environment
- To identify leadership behaviours in Higher Education (HE) environments that encourage rapid progression from work groups to high performance teams
- To evaluate how digital and media technologies can be used to accelerate behavioural transitions, particularly where split-site campuses represent a barrier.

MediaCity University of Salford (UoS) provides the live case- study for the proposed research. Occupied in September 2011, it provides 9,600m² of integrated space comprising 2,800 m² of open public access spaces including 'living laboratories' and large public performance spaces. This is juxtaposed with high-end teaching and research facilities developed and designed as a flexible drop-in facility. The space is designed to facilitate an incubation culture where cross fertilization of education and learning can grow in a natural organic way, with the intention of creating complex outcomes.



Figure 1: MediaCity UK

The visionary aspirations of Mediacity bring with it many human and organisational challenges in common with many HE institutions. Whilst the physical move can be legislated for, the 'psychological move' required by staff and students to realise the potential of a new working environment is more testing. The relocation involves all aspects of change including the breaking of emotional ties, the introduction of new processes (enabled by digital technologies) and familiarisation with a new facility. The leadership role entails being a pathfinder and scout, as well as guiding the progress of others through the transition.

8 METHODOLOGY

The case study analysis of MediaCityUK will apply a more general and contemporary seven stage model proposed by Adams (1984), (see Figure 2).

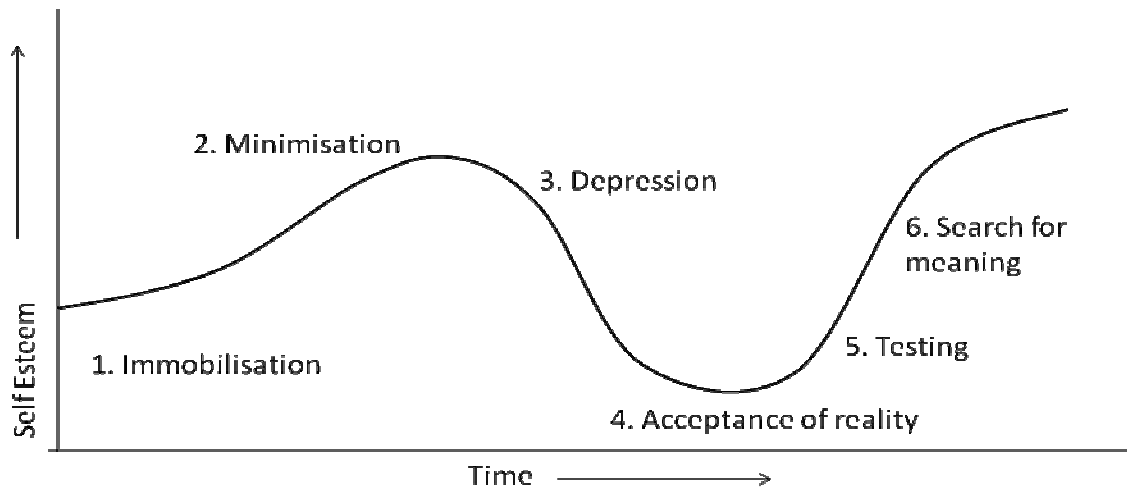


Figure 2: Adam's transition model

By means of a grounded approach whereby emergent themes are identified using probing open interviews, it is anticipated that a multiple stage model that accords (or otherwise) with other similar studies might be identified. The approach, using face-to-face interviews with 20 managers, will be based on the approach used by Stuart (1995) but will uniquely concerned with the impact of physical moves, rather than change issues in general.

9 FINDINGS TO DATE

Interviews with those affected by the move are ongoing. Whilst the physical move has taken place (as of September 2011), the 'mental' move is ongoing. Early analysis using 'emotion coding' (see Saldaña, 2009) has identified various emergent issues that recur. These issues relate to:

- Organisational pressures that overlay the move process in a climate of uncertainty
- Ambivalence towards new work environments that introduce leading edge technology whilst necessitating conformance to a less personalized setting
- Sense of loss of ownership in relation to 'time' as well as 'space' necessitated by the free-address system
- Acceptance that use of high value assets (multi-media studios and equipment) necessitate a level of sharing to enable leveraging of assets values.
- Evidence of sense of loss, with those affected by the break up and reassembly of work teams across a split site.

To date, the analysis of interview data has provided insight into part of the transition process. Whilst the issues identified above are typical of some of the emerging issues, a continued longitudinal analysis will be required to understand the transition journey of individual managers affected by the relocation.

10 CONCLUSIONS

Management theory in relation to facility relocation has much to tell us about the 'idealised' or espoused process. However, it has rather less to tell us about the reality of 'what is' based on a grounded understanding of human responses. The consequence of this is that organizations will continue to hemorrhage staff and will fail to recognize the necessary transitions that building users will experience during a move. Such transitions, which are highly personalized in relation to speed and paths taken, underlie the long-term outcomes of

any relocation, be it a small-scale churn activity, a localized facility relocation or a geographical uprooting.

In this paper we present more questions than answers. We highlight the fact that 'usability' is inadequate in characterizing the merits of a new building design. Such a concept throws light on the immediate cognitive and emotional response, but tells us little about the deeply felt emotional response which emerges over time.

Some of the key questions that arise from this analysis include:

- What are the unlearning and relearning processes that are required to overcome barriers to the adoption of new work environments?
- How do the individual emotional responses interact with this experiential learning process?
- Given the transitory nature of emotional responses, how can designers and facilities managers run the physical and emotional voyages in tandem?
- How do attempts by facilities managers to constrain or order highly flexible environments impact on this experiential learning process?
- How can we transplant place attachment more effectively whilst allowing a grieving process for past environments.

This work considers a largely unexplored area of research with very real commercial consequences for organizations, notwithstanding being difficult to measure. Foremost in this vanguard are the leading edge learning environments such as those encompassed in the MediaCity UK development.

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