



## Relocation Activities Checklist

	<b>Assigned to:</b>	<b>Due:</b>				

### **A. PLANNING**

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|---|--|--|--|--|--|
| 1. Delegate and assign responsibilities to each member of the move team.  |  |  |  |  |  |
| 2. Make a detailed list of all floors and departments in the order that they will be moved from the old facilities. Decide which departments should be in operation at the destination first. |  |  |  |  |  |
| 3. Schedule dates for the dismantling and reassembling of any equipment that needs to be moved before the actual move. This includes anything that requires more than the normal moving time. |  |  |  |  |  |
| 4. Determine if there are going to be moves done before the main move, or if the move will be broken down into phases.  |  |  |  |  |  |
| 5. Develop a master relocation project with milestones.   |  |  |  |  |  |
| 6. Develop an action plan for the move to minimize business disruption.<br>(i.e. weekend move - this will cost more)  |  |  |  |  |  |
| 7. Create a move calendar by working back from move target date.  |  |  |  |  |  |
| 8. Inventory all furniture, equipment and contents. Note size and if disassembly is needed.   |  |  |  |  |  |
| 9. Identify & photograph items such as paintings, sculpture that may need special handling  |  |  |  |  |  |
| 10. Figure out how to confirm that everything removed from all locations arrived at the new location.   |  |  |  |  |  |
| 11. Decide the number and size of cartons needed per office, or per employee. (Your mover can help here.)   |  |  |  |  |  |

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12. Schedule post-move training for security, fire and life safety procedures.						
13. Consider supplying identifying badges to vendors, movers and your employees.						
<b>B. NOTIFICATION</b>						
14. Confirm that the Certificate of Occupancy and other required permits or licenses have been obtained.						
15. Transfer your insurance to the new location. Get Certificates of Insurance from your insurance company. {Must be in place for early occupancy}						
16. Schedule public relations effort, including plans for news releases, articles, "office warming" parties, etc.						
17. File change of address forms with the Post Office for every person who receives mail at the office. The Post Office will forward your mail for one year.						
18. Notify banks, clients, insurance, IRS, services, software vendors, subscriptions, etc. of new address and phone number. Allow <u>6-8 weeks</u> for companies and subscriptions to update their records. Make up a master list for follow-up.						
19. Arrange for listing on lobby directory of new building. <u>Allow 6-8 weeks.</u>						
20. Confirm that change of address corrections have been made. Use master change-of-address list.						
a. Being long lead-time items early (furniture decisions & ordering)						
b. Phone numbers - can you keep your old one - what do you want your new one to do?						
21. Reconfirm the termination of old leases and the return of security deposits.						
22. Find out if any licenses or permits are required at new facilities. {city, professional, corporate}						

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### **C. MOVE IT**

#### **MOVING COMPANY**

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| 23. Collect and analyze movers' estimates.  |  |  |  |  |  |  |
| 24. Select an appropriate mover.  |  |  |  |  |  |  |
| 25. Check insurance costs from moving company.  |  |  |  |  |  |  |
| 26. Check adequacy of your existing insurance coverage for the move. Review your policies to make sure that all of your business equipment, appliances and furniture are covered before, during and after the move. |  |  |  |  |  |  |
| 27. Get Certificates of Insurance from the mover's insurance company.   |  |  |  |  |  |  |
| 28. Confirm delivery damage claims procedures.  |  |  |  |  |  |  |
| 29. Arrange for touch-up and repair of any items damaged in the move. Get advance approval of repair service from the mover.  |  |  |  |  |  |  |

#### **MOVING PREPARATION**

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| 30. Confirm building policies and procedures at both locations. Also, clarify labor policies and any move-in conditions at the new location.   |  |  |  |  |  |  |
| 31. Check doorways, corridors, elevators, stairwells and loading docks at both locations for ease of egress and entry. Confirm the weight and size of the furniture the elevator can lift. |  |  |  |  |  |  |
| 32. Arrange for elevator time at both elevators for move 120 days prior to move date   |  |  |  |  |  |  |
| 33. Arrange with the building manager to have air conditioning in operation during the move-in at both locations. Keep track of the hours. You may be billed.                              |  |  |  |  |  |  |
| 34. Arrange for the distribution of parking passes and security cards for the new facility.  |  |  |  |  |  |  |
| 35. Purge existing files and storerooms before the move. Send closed files to off-site storage.  |  |  |  |  |  |  |
| 36. Maintain proper records for proper control and audit processes.  |  |  |  |  |  |  |

## Relocation Activities Checklist

	Assigned to:	Due:				
37. Install locks at the new facilities and make duplicate keys. Distribute keys to appropriate employees.						
38. Protect elevator cabs, lobbies, walls and floors against damage from moving.						
39. Photograph what you plan to keep and what will be moved. Keep photos in a photo album to prove any claims for damages made during the move.						
40. Put up directional signs, room and area labels, furniture plans in the new facilities.						
41. Arrange to feed employees, if appropriate, during the move or on delivery day at the new location.						
a. Arrange to store & move new equipment ordered.						
<b><u>COMMUNICATE WITH EVERYONE</u></b>						
42. Arrange a tour of the new facilities prior to move day for all movers, including employees and contractors.						
43. Explain to each employee exactly what they will be required to do: remove contents from desks; pack books and files; color code boxes, etc.						
44. Make sure all employees know what to do, when and where to report to their new workstations when the new office opens for business.						
45. Establish communications between new and old locations to help with move coordination. (Cell phones can play a key role.)						
<b><u>PACKING &amp; UNPACKING</u></b>						
46. Order cartons from your mover, or purchase from other source.						
47. Schedule distribution of packing equipment such as boxes and bins, and schedule the actual packing.						
48. Clarify who is doing the packing: your employees, the mover, or what combination.						

## Relocation Activities Checklist

	<b>Assigned to:</b>	<b>Due:</b>				

49. Be very specific on whom, what, when and how people are to handle the contents of desks, pictures, plants, etc.
50. Schedule staff for unpacking and stocking supply cabinets, storerooms, file rooms and removing tags from all furniture and equipment, so your company will be operational as rapidly as possible after the move.

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**MONITOR THE MOVE**

51. Someone should be available at the old facilities to answer questions and give directions to the movers. Record the start time of the move and the number of movers working on your move.
52. Check inventory as contents are loaded into each moving van. Seal each van when full.
53. After the last moving van is loaded but before it leaves, walk through the facilities to search for anything left behind. Look in elevator, lobbies, hallways and offices.
54. Carefully read the bill of lading before you sign. It is the contract between you and the mover.
55. Keep it with you until everything is delivered, charges are paid, and any claims are settled.
56. Someone should be at the new facilities to answer questions and give instructions to the movers at the new location. Record what time the movers arrived and the number of movers working on your move.
57. Indicate on the mover's inventory any damaged boxes or items before you sign anything. This is necessary to process claims.

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**AFTER THE MOVE**

58. Collect parking passes, security cards and keys for old facility. Use a checklist. Confirm the return of any deposits held by the landlord for these items.
59. Audit final invoices against contracts, progress payments and pay retention.
60. Complete and file all warranty information for all new furniture and equipment.

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## Relocation Activities Checklist

	Assigned to:	Due:				

61. Update fixed asset accounting system for any new furniture and equipment purchased.  
Do not forget to delete any old furniture sold or given to charity.

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### D. THINGS THAT NEED TO GET MOVED

#### PHONES

62. Get estimates for telephone system and its installation at new location.

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- a. You should have arranged for new/transferred phone numbers.

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63. Select telephone system for new location.

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64. Arrange for telephone trunk lines at the new location, if necessary. Obtain telephone numbers) for the new location. This should be done as early as possible, so that the listing in "this year's" telephone directory and Yellow Pages will be correct.

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65. Make sure the telephone company will install a recording on your old phone number that gives out your new number. Insist that the recording be in place for at least six (6) months. Confirm in 2 weeks.

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66. Schedule telephone installers on a standby basis to take care of any last minute changes quickly, so that communications can be in operation when the offices open.

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67. Confirm that telephones at the new address will be operating properly on or before move-in day.

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68. Reconfirm that telephones at new facility will be operating properly on or before move-in day.

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69. Have a new phone list and map showing location of all departments on each person's desk when the offices open for business.

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70. Confirm that when you call your old telephone number, a recorded message or an operator gives out your new telephone number correctly.

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- a. If you've chosen a new phone system, employees must be trained prior to moving day.

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#### NETWORK AND CABLING

## Relocation Activities Checklist

	Assigned to:	Due:				
71. Determine cabling needed. Be sure it is available in the new area.						
a. Who is responsible for removing old cabling prior to your move in?						
b. Be sure cable company clearly marks your cable in the						
c. Know who is responsible for taking out your cable when you leave.						
72. Determine lead times necessary for installation.						
73. Interview vendors.						
74. Select vendors.						
<b><u>FURNITURE</u></b>						
75. Buying new office furniture? This function has one of the longest lead times. Start early.						
76. Schedule for refurbishing of existing furniture and equipment. Allow enough time for the refurbishment and its on-time delivery to the new facilities.						
77. Schedule the delivery and installation of new furniture and equipment.						
78. Arrange to sell or discard obsolete furniture and equipment. Find buyers, or donate to charity for tax deduction.						
79. Code all furniture and equipment, on a color coded floor plan of the new facilities to show where each item should be placed. (Do not overlook this step.)						
80. All keys to desks, file cabinets, etc. should be wire-tagged, labeled and placed in a safe place. Tape keys to empty desks and file cabinets. Make sure that you have duplicate keys.						
81. Mark, tag and color-code every item to be moved (this is a big job)						

**OFFICE MACHINES**

## Relocation Activities Checklist

	Assigned to:	Due:				
82. Check on lease status and termination feasibility.						
83. Confirm relocation policies on leased equipment, some firms will only honor their warranty programs if they prepare and move equipment.						
84. Decide which equipment to keep and which to sell.						
85. Schedule the delivery and installation of new equipment.						
86. Arrange to sell or discard obsolete equipment. Find buyers or donate to charity for tax deduction.						
87. Code all equipment, on a color coded floor plan of the new facilities to show where each item should be placed.						
88. Mark, tag and color-code every item to be moved.						
<b><u>COMPUTERS</u></b>						
89. Consider having individuals move their own computers. This works well in smaller organizations.						
90. Develop contingency plan for computer malfunction during and after move.						
91. Check all computers, copiers, word processors, and other equipment for the proper preparation for moving. Verify if using your mover will void any warranties of service contracts.						
92. Back up computer systems. Hand carry backup to new facilities.						
a. Install and test new software prior to move						
<b><u>FILES AND MORE FILES</u></b>						
93. Check with moving company to determine if they move filing cabinets full or empty.						
94. You'll need lots of boxes here. They will need to be sturdy and not too large.						
<b><u>KITCHEN</u></b>						
95. Moving a refrigerator takes advanced planning. (Do you want an icemaker?)						



## Relocation Activities Checklist

	Assigned to:	Due:				

**ART WORK**

96. Arrange separately for art work, chalkboards, whiteboards, etc., to be taken off the walls at your old facilities. Arrange for their installation at the new facilities. Movers do not remove or install these types of items.

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97. Some movers will not move art work. Others will require special and sometimes expensive insurance for "objects of art".

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**PLANTS**

98. Remove plants before packing to give extra room to work. Install plants at new facility after unpacking is complete.

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**SECURITY SYSTEMS**

99. Arrange to relocate your present security systems and procedures, to your new facilities, or confirm the installation of new systems and procedures.

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100. Develop a cost effective way to make the transition from the old stationery and forms to the new without running out of the old, but also without having to throw away much.

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101. Place an order form for the new stationery using the new address, subject to confirmation of the new telephone number.

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102. Confirm that new letterhead, envelopes, and business cards are printed when new information is absolutely certain.

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103. Have rubber stamps and labels made to cover the old address on literature while making the transition to new material.

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**E. RECOGNITION**

104. Plan for gifts and public recognition or cash payments, as necessary, to appropriate people, for expediting difficult tasks.

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105. Hold an office warming party, after things have settled down.

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### **F. CLEAN UP**

106. Arrange for cleaning after move has been completed; all boxes, cartons, bins etc., should be removed as soon as possible. (Determine what to do with these, i.e. sell/recycle)

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107. Arrange for the maintenance of the new facility. Establish housekeeping rules to prevent unwanted personal decorating.

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