

# Move Planning Guide

Well before a contemplated relocation, appoint a relocation committee from within the organization to facilitate a smooth transition. The committee should designate a move co-ordinator who will assume responsibility for all aspects of the move. Careful advance planning is required as some items require long lead times.

The following is intended as a guideline in preparing a complete list based upon specific circumstances. Always assign responsibility for each component to an individual who will be responsible for completing each item and reporting back to the move coordinator.

## 1. MOVERS

Several qualified movers shall be asked to bid. Each invited bidder should receive a furniture plan and inspect existing premises to determine number of bins/cartons required. Insurance carried by the mover and their previous experience should be verified.

## 2. SCHEDULE

Determine if the move will take place in a single phase or multiple phases. Will the move occur over a weekend or during normal business hours? Establish a schedule for:

- Date and hours of move by department
- Date and hours for move of special equipment
- Date for delivery of all new furnishings
- Date for delivery of all refurbished items

## 3. STAFF COMMUNICATION

Prepare memos to staff to keep all personnel advised of move dates, time of packing, parking arrangements or availability of public transit, eating or public restaurant facilities, etc. Provide staff with seating plans and phone lists on the day of the move.

## 4. TOURS

Arrange for each department to tour of the new premises prior to move-in.

## 5. CHANGE OF ADDRESS NOTICES

Print and prepare all mailings well in advance for moving notifications. Send several reminders before and after the move. Be sure to include:

- Bank and financial institutions
- Clubs, organizations and professional associations
- Credit accounts and credit cards
- Customers and prospective customers
- Insurance companies
- Newspaper and magazine subscriptions
- Post office
- Telephone & internet
- Suppliers and special services
- Government authorities
- Hydro
- Gas company



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## **6. PRESS RELEASES**

Schedule public relations efforts, including plans for news releases, articles, receptions, etc.

## **7. VOICE AND DATA**

Long lead times may be required for voice and data connections and new hardware (if required). Confirm availability of fiber at new location. Confirm new telephone and fax numbers.

## **8. CABLING AND LAN**

Coordinate the move and set up of LAN rooms and cabling.

## **9. UTILITIES**

HYDRO, GAS AND WATER - Have meters read at new and old locations. Arrange disconnection and connection to special equipment.

## **10. INSURANCE**

Property insurer should be advised of coverage requirements and dates. Overlapping coverage should be arranged if both locations will be occupied simultaneously.

## **11. SECURITY**

Arrange for temporary security at old and new premises during move and permanent requirement for new premises.

## **12. MAINTENANCE RESPONSIBILITY**

Arrange for continued in-house supervision and maintenance at new premises.

## **13. MAINTENANCE INSTRUCTIONS**

Prepare care and maintenance instructions for architectural finishes and all new furnishings and equipment. Determine target dates in advance for carpet cleaning, drapery cleaning, repainting, etc.

## **14. FURNITURE REQUIREMENTS**

Is there any Additional Furniture Required? Is there custom design furniture needed? Is furniture being refurbished? Does the system furniture supplier disassemble/reassemble?

## **15. PREMISES RESTORATION**

Confirm tenant obligations with respect to restoration of old premises along with obligations for cleaning, etc.



## **16. LETTERHEAD**

Design letterhead with new address, telephone and fax numbers. Confirm new postal code and suite numbers.

## **17. CORPORATE SIGNAGE**

Signage Signs for Interior and Exterior of New Premises.

## **18. CLEANING**

Arrange to have cleaning of original premises done after vacating. Have new premises cleaned and ready for occupancy after move-in. Establish cleaning contracts for on-going maintenance.

## **19. KEYS AND PASSCARDS**

Arrange for keys and passcards from vacated premises to be turned in prior to move. Assign keys and passcards for new premises to appropriate personnel. Arrange for photographs if necessary.

## **20. ELEVATORS AND RECEIVING DOCKS**

Make arrangements to reserve elevators and truck docking areas during the move. Check loading capacity and size of elevators.

## **21. SUPERVISING CO-ORDINATION**

Choose personnel to supervise packing/unpacking and move at old and new premises.

## **22. MOVING SIGNAGE**

Prior to move, arrange for directional signs or color-coded cards and room number signs in new premises.

## **23. TAGGING**

Assign personnel for tagging of all equipment by numbered room or location on the floor plan.

## **24. PACKING**

Assign personnel to distribute packing instructions, packing equipment, and to check delivery of all items at the new site per inventory lists.

## **25. FILING**

Arrange for sorting/storage disposal of all archive/dead material prior to move.

## **26. UNPACKING**

Schedule staff for unpacking of files and stationery after moving.



**27. CLEAN UP**

Arrange for packing debris clean up of new areas. Remove all cartons and tags on furniture after move.

**28. DEFICIENCY CHECK LIST**

Accumulate individual workstation defects and deficiencies, as required, following move-in.

**29. SAFETY**

Familiarize employees with Fire and Life Safety procedures at new location.

**30. INVENTORY LEVEL**

Ensure sufficient levels of inventory are available during the period impacted by move.

**31. CONTINGENCY PLAN**

Have a back-up plan in case new premises not ready on time.



STAGE OF COMPLETION	PERSON RESPONSIBLE	START DATE	IN PROCESS	COMPLETED
<b>STAFF MEMO - MOVE DETAILS</b>				
<b>CHANGE OF ADDRESS NOTICES</b>				
<ul style="list-style-type: none"> <li>• Banks and financial institutions</li> <li>• Clubs and organizations</li> <li>• Credit accounts and Credit card</li> <li>• Customers</li> <li>• Insurance companies</li> <li>• Lists from Ledgers</li> <li>• News paper and magazine subscriptions</li> <li>• Post Office</li> <li>• Voice and Data providers</li> <li>• Prospects and others lists</li> <li>• Supplies and special services</li> <li>• Stationery and business cards</li> </ul>				
<b>PUBLIC RELATIONS</b>				
<ul style="list-style-type: none"> <li>• Schedule press releases</li> <li>• Client announcement</li> <li>• Receptions</li> <li>• Signs</li> </ul>				
<b>MOVERS</b>				
<ul style="list-style-type: none"> <li>• Tender</li> <li>• Qualifications check</li> <li>• Selection</li> <li>• Mover's insurance check</li> <li>• Ensure movers have floor plan, schedule</li> </ul>				
<b>SPECIAL MOVING REQUIREMENTS</b>				
<ul style="list-style-type: none"> <li>• Equipment moved by manufacturer or specialty movers</li> <li>• Fax and copiers</li> <li>• Mailing machines</li> <li>• Safes</li> <li>• LAN equipment</li> </ul>				
<b>SECURITY</b>				
<ul style="list-style-type: none"> <li>• Old premises</li> <li>• New premises</li> </ul>				



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STAGE OF COMPLETION	PERSON RESPONSIBLE	START DATE	IN PROCESS	COMPLETED
<b>ELEVATORS</b>				
<ul style="list-style-type: none"> <li>Reserve elevators and docking area</li> </ul>				
<b>CLEANING</b>				
<ul style="list-style-type: none"> <li>New premises before occupancy</li> <li>Old premises after move</li> </ul>				
<b>KEYS/ENTRY CARDS</b>				
<ul style="list-style-type: none"> <li>Collect old keys/entry cards</li> <li>Assign new keys/entry cards</li> </ul>				
<b>SCHEDULE MOVE</b>				
<ul style="list-style-type: none"> <li>Assign move supervisor to departments</li> <li>Plan date and hours of move by department</li> <li>Plan date of delivery of new furniture</li> <li>Plan date of delivery of refurbished items</li> <li>Tag all equipment and furniture by location</li> </ul>				
<b>FILING</b>				
<ul style="list-style-type: none"> <li>Sort /store/ dispose of dead material prior to move</li> </ul>				
<b>UNPACKING</b>				
<ul style="list-style-type: none"> <li>Schedule staff</li> </ul>				
<b>CLEAN UP</b>				
<ul style="list-style-type: none"> <li>Plan removal of all cartons and tags</li> </ul>				
<b>ASSIGN MAINTENANCE</b>				
<ul style="list-style-type: none"> <li>Kitchen</li> <li>Washrooms</li> </ul>				
<b>DEFICIENCY CHECKLIST</b>				
<ul style="list-style-type: none"> <li>Complete work station deficiency checklist</li> </ul>				



STEVE KERLOVICH  
TENANT ADVISORY SERVICES