The Relocation Guide

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Table of Contents

Introduction 1

Advance Planning
  Form a Move Team 2
  Review Existing Space 2
  Evaluate New Location 2
  Transfer Telephones & Data Connections 3
  Contact the Mover 3
  Obtain New Locks & Keys 4
  Acquire Building Access Cards 4
  Change Address 4
  Utilize Facility Managers 5
  Request Parking 5
  Maintain Security 6
  Obtain Storage 6
  Dispose of Refuse 6
  Eliminate Excess Office Equipment 6
  Condition of Vacated Space 6

Packing List 7

Moving Day 8

Advance Planning Summary 9

Contact List 11
Introduction

A move is always difficult, even if your new location meets your unit's needs better. This guide is designed to help plan and execute your relocation. It is divided into three sections. The Advance Planning component details aspects of your move to be addressed well ahead of moving day. The following two sections, A Packing List and Moving Day, provide reference lists of important items to consider as you change locations. The Advance Planning Summary offers an abbreviated guide to moving and the Contact List furnishes necessary numbers and, if available, website addresses.

The Space Management Office hopes you will find this guide to be a helpful resource. For move planning assistance, comments, or questions please feel free to contact us at 263-9134. Good luck on your move!
Advance Planning

Form a Move Team

You don't have to coordinate a move alone. Bring as many areas, departments, and offices into the planning process as necessary. A team effort from the start will not only ease the strain, but also reduce the potential for problems at your new location.

To complete your move, you may work with groups outside of your unit such as the Space Management Office (SMO), the Division of Information Technology (DoIT), Physical Plant, Business Services, commercial movers, and various other campus departments and outside vendors. Each of these groups contributes experiences that may benefit your situation.

Since relocation efforts will significantly impact your staff, consider adding an employee assistance consultant to your move team. The Employee Assistance Office is the campus resource to help units and individuals deal with a broad range of behavioral health issues including change and relocation.

Review Existing Space

During the initial phase carefully review the space you will be leaving. By recognizing any special circumstances now you can avoid delays or mishaps on moving day. Note the general configuration of the space, the furniture, the office equipment, and the telephone and data connections. Consider items to be discarded. Also note any sensitive or irreplaceable equipment which may need separate moving arrangements.

If you have any equipment that is covered by a service contract or a lease agreement, review the contract in advance of the move. Certain equipment leases may require prior notification of a move, perhaps as much as 60 days. Some agreements may also require a specific moving company.

The University's contracted movers will not move biohazard, radioactive, volatile compounds, or gas cylinders. Separate arrangements will need to be made with the Environmental Health and Safety Department.

Evaluate New Location

Layout

Begin to think about the space into which you will be moving. Space Management can provide you with floor plans for the new space, complete with square footage and door and window placements. You should examine the location of existing telephone and data connections, electrical outlets, permanent shelf units, blackboards, radiators, risers, etc., as these are not on the floor plans. You may also request ¼” furniture templates from the Space Management Office. These may be used with ¼” graph paper or scaled floor plans, as available.

Review the new space for possible efficiencies. Evaluate how furniture placement might improve circulation patterns and the general utilization of space. Create several alternate furniture arrangements to determine which configuration best suits your needs. Movers often request diagrams of your new space to assist them in the placement of large items. Your new location will never be identical to your existing space, but it can provide many new opportunities.
If remodeling had been scheduled, you should communicate with Physical Plant to follow the project's progress and to assure that your space will be available for occupancy as scheduled. Similarly, if you are relocating modular or systems furniture that needs to be disassembled and then reassembled, extra time may need to be built into your schedule.

**Signage**

Carefully evaluate signage for your new location. It may be possible to take some of your existing signs with you, or you may find it necessary to have new ones made. If you currently have removable name plates for each office and are planning to use them at the new site, make certain they are appropriately sized for the holders in your new space, and that they do not conflict with existing signs in the building. If you find you will need new signage, contact **Physical Plant** to make arrangements.

If you are relocating to a building with a central directory, determine who updates the directory (usually the Facility Manager) and contact him/her to make certain the correct department and staff information is displayed.

**ADA Compliance**

During this early evaluation process it may be advantageous to review the Americans with Disabilities Act (ADA) requirements to ensure that your new space meets the needs of all possible users. The ADA has rules regarding sign type and placement, accessible routes, protruding objects, etc. During the moving period, it is especially important to be aware of policies involving parking, elevator usage, and temporary signage. An accessible route through or around the moving area must be maintained at all times. With questions, contact the **Facilities Access Specialist** at Facilities Planning and Management.

**Transfer Voice and Data Connections**

**Voice**

After you have a plan for your new space, you should contact the Division of Information Technology (DoIT) and begin the process of transferring your existing voice services. Both DoIT and the telephone company need to know which phone lines to transfer, where, and by what date. Make certain to include fax machines, modems, TTYs and any other devices which have their own telephone number. Allow several weeks lead-time. Costs for services vary depending on the effected building(s) and the amount of work to be done.

**Data Connections**

Work with your network administrator and **DoIT** to determine what data connections you will need and when activation should occur. Wiring status and server access of the new space should also be reviewed. Keep in mind that rewiring or additional hardware may be required at the new site.

**Choosing a Mover**

The **Space Management Office** (SMO) can serve as a resource for many of your moving needs and departmental move coordinators are encouraged to discuss their needs with Space Management staff regardless of the type of move. If several units within a building are moving at the same time, or if moves need to be staggered to facilitate a major renovation project, SMO will coordinate the moves supporting these projects.
If you are relocating outside of your present building, one of the University's contracted movers is typically used. Smaller moves of one or two offices, or moves within a building, may be handled by the Physical Plants Campus Services.

Movers will want to walk through your current space to review the items that they will be moving. This provides you with an opportunity to discuss with them the moving of unique, sensitive or irreplaceable equipment. Review the access areas to both your new and old buildings and any road construction that may affect the route. Evaluate building door sizes, parking needs and elevator access. Movers may want to see the space into which you are relocating in order to determine points of entry and to better assess your needs.

The mover will estimate the time needed and the cost of the move and help establish a specific start and finish time for the actual move process. A well-defined timeline will make the final move easier to coordinate.

**Obtain New Locks and Keys**

Contact the Physical Plant Lock Shop (go to Key Requests on the web page) far enough in advance to discuss keying options, to give them time to prepare the keys, and to complete any necessary lock core changes in your new location. The amount of preparatory time required will depend upon the size and condition of the space into which you are moving. Allow extra time if you have special security or access issues.

**Acquire Building Access Cards**

Contact the Facility Manager for your new location to determine whether a card access system exists in the building and to request building access cards.

**Change Address**

**User Notification**

Not only do you need to get your staff to the new location, but you need to get students, visitors, and customers there as well. Create a list of businesses, magazines, customers, service providers and other appropriate contacts and notify them of your relocation. If applicable, update your address and phone numbers on your web-site as well. You may also consider temporary signs at your present and future locations. For units who primarily serve the student population, advertisements in the student newspapers may be appropriate.

**Payroll**

Employee Compensation and Benefits Services needs to be informed of changes in office locations. A separate Change of Address Form needs to be completed for each person prior to the move.

**Printed Materials**

Create a list of everything with your current address printed on it (letterhead, brochures, etc.) You will want to make certain that once you have relocated, all of your printed materials have the correct address, telephone (including TTY), and e-mail address information. Order revised business cards and stationary through University Communications. Other materials should be ordered via your normal campus services.
Consider other entities where your office is listed as a resource such as Visitor Information Programs, city/state visitor information, etc. Notify them of your move so you can be listed correctly in bulletins, directories, maps, and other official publications.

**Campus Mail**

You will need to check with [Physical Plant Campus Services](#) (go to Deliveries/Moving on the web page) to determine if your new location is currently served by campus mail. If not, you will either need to establish service or identify a pick-up location. If your new space is located in a building with a mail center, contact the Facility Manager to obtain a mailbox or to activate your mail service within the building. Forwarding large volumes of mail will be labor intensive for the mail center and will cause delays, so it is important to get your new address to your customers or contacts before you move.

**U. S. Mail**

The U. S. Postal Service will not forward mail between campus buildings. The best way to insure prompt deliver is to notify your customers of your address change several weeks before your move. Once you have moved you will need to work with the mail room at your previous location to forward your mail using the campus mail service.

**Materials Distribution Services**

You will need to notify [Materials Distribution Services](#) of your new address to ensure uninterrupted delivery service as well as receipt of monthly billing statements.

**Courier Services**

If your office utilizes any departmental courier service, be sure to inform them of your new location and to confirm that they will deliver to the different building.

**Risk Management**

Contact [Risk Management](#) early in your planning process to address any insurance or underwriting questions.

**Utilize Facility Managers**

Facility Managers at both your current and future locations can provide you with a wealth of information regarding various aspects of your move. They may be able to supply you with the necessary keys for the movers as well as assist you in determining the easiest access points in the building. You should also discuss mail services and signage with them.

**Request Parking**

If your new space is located far from your current site, you should contact [Transportation Services](#) to determine which lots may be available to your staff. Parking assignment transfers can be accommodated only if space is available in the new lot(s) of your choice. Parking lot transfers may also have to be coordinated with your Division Parking Coordinator.
Contract movers are responsible for contacting Transportation Services and purchasing parking permits if they are using University parking areas for their trucks. If a city street will be affected during the move, contact the Madison Police Department.

**Maintain Security**

Notify [University Police](#) of your move and discuss access and security issues. Provide them:
- The building(s) and room(s) involved in the move
- The time frame of your move
- The names(s) for departmental contacts associated with the move
- The name of the moving company

**Obtain Storage**

If you have storage needs during or after your move, you should determine the type of storage desired (long or short term), the level of access needed, and the amount of space required. [MDS Distribution Facility](#) may provide temporary space.

**Dispose of Refuse**

Moving generates a large amount of refuse. Contact [Physical Plant Custodial Services](#) to request additional trash and recycling containers at your old and new locations. It may also be necessary to provide an additional dumpster outside the building.

If your office handles hazardous materials (paints, solvents, chemicals, etc.), contact the [Environmental Health and Safety Department](#) at least one month prior to your move to determine the best method for disposing of these items. Do not abandon unwanted hazardous materials at your old location.

Before discarding old files or records, contact [University Archives](#) to discuss retention requirements. If appropriate, review your office's record retention plan as well.

Confidential material should be shredded before being disposed. The University has a contract with a commercial shredding service for large volumes of material. Contact [Purchasing Services](#) (go to VendorNet) to determine the current provider.

**Eliminate Excess Office Equipment**

If you have unwanted office equipment such as desks, chairs, computers, etc., Surplus With A Purpose (SWAP) will arrange to have the items picked up and sold. This program is part of the University's efforts to avoid sending old equipment to landfills whenever possible. Please contact them as far in advance of your move as possible.

**Condition of Vacated Space**

The space you are leaving needs to be entirely vacant and ready to be prepared for future occupants, possible remodeling, or even demolition. All recyclables, discarded furniture, chemicals or other equipment must be removed. Space Management staff will be glad to assist you with any questions you may have.
Packing List

Below is a list of general guidelines to consider as you pack. Always consult with the mover regarding specific packing instructions. It is advisable to create an inventory of all items to be moved. Indicate where each item should go, using room numbers whenever possible. Be sure to encourage staff to take advantage of this opportunity to clean house!

Office Equipment

♦ File Cabinets
  Lateral files must be emptied; vertical files may be left intact.
♦ Desks, Credenzas, Storage Cabinets, Movable Book Shelves
  All should be emptied.
♦ Photocopiers, Computers, Fax Machines, Telephones
  If a lease, contract, or warranty covers them, contact that company. They may be responsible for moving the equipment. If they are not responsible for the equipment's move, have the machines serviced immediately prior to their relocation.
♦ Wall Fixtures (whiteboards, shelves, etc.)
  Contact Physical Plant to arrange for their dismantling and reassembly at the new site.

Moving Supplies

♦ Contract movers will provide boxes, plastic totes, carts, bubble wrap, and other supplies. If you are not using a contract mover you can still purchase boxes from them, or you can use any sturdy box of average size. (After the move, contract movers will repurchase all used and unused boxes they provided.)
♦ Movers will not generally pack or unpack your materials.
♦ Fill each box completely, taping securely.
♦ Place a moving label on the front and side of each box, identifying the room it is going to.

Personal Items should be moved by the occupant. It is recommended these be taken home before the move and brought to your new location a week after the move to prevent damage.

Unique, Sensitive, or Irreplaceable Equipment

♦ Have the equipment properly prepared for the move.
♦ For some specialized equipment it may be necessary to hire a separate mover.
♦ Discuss with Risk Management the need to purchase additional insurance for select high value items.
Moving Day

Successful moves require coordination, cooperation, and patience. Below are a few pointers that should smooth the way to your new location.

- Make certain everyone is completely packed the day before the movers are to arrive.
- Review the entryways to both your old and new buildings with the mover. If elevator access is required for the mover, be certain to have the appropriate keys available.
- Make certain the mover can enter all sections of the building effected by the move. Provide keys if appropriate.
- Confirm the move's start and end times with the mover, and coordinate these with the Facility Manager(s) at your present and future locations.
- Post floor plans on doors and throughout your new space. Note names or room functions on the plans.
- Tape diagrams of the furniture layout to the door of each room to aid with proper furniture placement.
- Keep the areas clear of all people who do not need to be present during the move. Designate one person at each end to act as a traffic coordinator. Have the mover personally meet these people beforehand, so if questions arise movers will know whom to contact.
- Make certain the accessible path routes to the buildings are maintained throughout the move.
- Use temporary signage to direct people around the sites and/or to alternate routes.
- Secure personal items (purses, wallets, etc.) at all times.
Advance Planning Summary

Form a Move Team
♦ People within your unit
♦ Other resources:
  - Space Management Office (SMO)
  - Division of Information Technology (DoIT)
  - Physical Plant
  - Purchasing Services
  - Movers
  - Employee Assistance Office
  - Environmental Health and Safety
  - Office Systems Vendor

Review Existing Space
♦ Existing furniture and equipment
♦ Specialized equipment with service contracts or lease agreements that pertain to moves
♦ Volatile compounds that cannot be moved by contract movers Contact Environmental Health and Safety

Evaluate New Location
♦ Layout
  - Floor plans: Contact Space Management Office
  - Telephone and data connections: Contact DoIT
  - Installation of wall units, etc.: Contact Physical Plant
  - Systems Furniture layout: Contact Vendor or Physical Plant, as appropriate
♦ Signage
  - Current signs: Review for appropriate style and size for new space
  - New signage: Contact Physical Plant or Purchasing Services
  - Building directory: Contact Building Manager
♦ ADA Compliance: Contact the Facilities Access Specialist

Transfer Telephones and Data Connections
♦ Telephones
  - Identify all telephone lines (phones, faxes, modems, TTYs, etc.)
  - Decide where and when each number should be transferred: Contact DoIT
♦ Data Connections
  - Identify and evaluate data connections and wiring status at the new site: Contact DoIT

Contact the Mover
♦ Moves Between Buildings Contact a commercial mover
♦ Moves Within Buildings Contact Physical Plant or a commercial mover
♦ Schedule walk-through to discuss access points and to review the move of sensitive equipment
♦ Establish start and end times for your relocation efforts

Obtain New Locks and Keys
♦ Contact Physical Plant
Acquire Building Access Cards
♦ Contact Facility Manager at new location

Change of Address
♦ User Notification
   Mail notices to most frequent contacts
   Utilize temporary signs or advertisements
♦ Payroll
   Change address for each staff member: Contact Employee Compensation and Benefits Services
♦ Printed Materials
   Amend items printed by your department
   Notify other University offices that publish materials for you
   Order revised business cards: Contact University Communications
♦ Campus Mail
   Change delivery location Contact Physical Plant
   Activate service within new building: Contact Building Manager
♦ U. S. Mail
   Inform customers, journals and newspapers of your new address
   Remind staff to change addresses on personal professional mailings
♦ Contact Materials Distribution Services
♦ Contact departmental Courier Services
♦ Contact Risk Management
♦ Notify Building Managers at your current and future locations

Request Parking
♦ Campus: Contact Transportation Services
   Determine if lot reassignment for personnel is possible
   Work with your Division Parking Coordinator
   Discuss parking for mover's vehicles
♦ City: Contact Madison Police Department
   Discuss parking for mover's vehicles on city street(s)

Maintain Security
♦ Contact University Police

Obtain Storage
♦ Contact Materials Distribution Services
   Determine types
   Establish level of access
   Decide on amount of space

Dispose of Refuse
♦ Trash and recyclables: Contact Physical Plant
♦ Hazardous materials: Contact Environmental Health and Safety Department
♦ Files and records: Contact University Archives

Surplus Office Equipment
♦ Contact SWAP

Inspect Condition of Vacated Space
### Contact List

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<tr>
<th>Service</th>
<th>Contact</th>
<th>Notes</th>
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<td>Americans with Disabilities Act (ADA) Coordinator</td>
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