



Office Relocation Checklist



BY JACCI DUNCAN

Relocating your association's headquarters can be time-consuming, costly, and disruptive to your operations and ability to provide continuous member service. Use this checklist to help you plan wisely and transform this potentially debilitating process into a success.



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- Assess your needs.** What is the purpose of your relocation, and what do you hope to gain from it? Associations, for example, might want to locate closer to a state capitol, or to Washington, D.C., for advocacy purposes. Others might have too much space and need to downsize. Still others might want to have more office space to accommodate growth. Only after you establish why you want to relocate will you be able to define your needs and map out your relocation plan.
- Create a budget.** A relocation budget is a critical planning tool that will help you assess your costs and manage them throughout the process. Beyond the obvious one-time costs, such as a moving service and utility hook-ups, don't forget the less obvious expenses such as furniture installation, stationery reprinting, data transfer fees, and phone and data cabling.
- Build a relocation team.** Include the people who will help facilitate different aspects of the move, such as the person

responsible for assembling a team to label and pre-pack the computer equipment as well as unpack and arrange the equipment at the new location. Appoint staff to be in charge of all communication issues—from staying in touch with members to handling the telephone changeover. And designate one person to manage the relocation effort on a daily basis and be your point of contact.

- Establish operational goals.** Your operational goals will influence the look and function of the new office. To identify operational goals, ask the following questions: How will the office space be allocated for staff offices and common areas? What works in our current office? What could work better?
- Create a master schedule.** Developing a master relocation schedule not only will help you plan the relocation, but also will function as your road map to carry out the multitude of tasks involved with the effort. The schedule should include all of the tasks that need to be completed (and the steps leading up to them), the individuals and teams responsible for completing each task, and the deadlines. A good way to start is to focus on key accomplishments, such as an operational phone system or a functional computer network. But don't forget the smaller stuff, such as ordering new stationery and business cards so that they arrive in time for the move.
- Determine upgrades.** If your association needs any upgrades, such as to the furniture or the computer network, consider doing them during the relocation process. Although this may add to the cost of your move, it will save money and time in the long run.
- Get rid of what you don't need.** Why not purge your files or storage area of unneeded items prior to moving? You would certainly save money on moving costs and have a more up-to-date system for the new office.
- Create a member services strategy.** To provide the most continuous member and chapter services and make the move seamless to your members, create a system that ensures that calls, e-mails, faxes, and correspondence are all handled with care and consistency throughout the process. Consider a week-end move to minimize disruption.
- Pick the right time.** If you have control over the time period in which the office relocation will occur, use it to your advantage. An optimal move time avoids the crunch times associated with big events, heavy administrative output, or intensive customer service.

When relocating a national headquarters, some disruption to daily operations is inevitable. However, you can minimize the disruption by having a detailed move plan and a capable relocation team to keep the process on track.

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