

# A Practical Guide to Moving to a New Site for Public Health Laboratories

APHL Report



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MAKING A SMOOTH LAB MOVE

The Association of Public Health Laboratories (APHL) is a national nonprofit organization dedicated to working with members to strengthen governmental laboratories that perform testing of public health significance. By promoting effective programs and public policy, APHL strives to provide member laboratories with the resources and infrastructure needed to protect the health of U.S. residents and to prevent and control disease globally.

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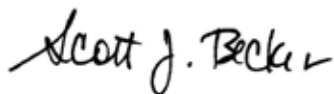
## Executive Summary

Public health laboratories are facing simultaneous calls to get bigger and to get smaller. With the pressing needs of biosecurity, pandemic threats, and even health reform, they must do more. Yet at the same time, budget cuts mean they must become as efficient as possible in order to get the most out of existing resources, and sometimes that means reducing services.

One result of this era of change for labs: Your lab's space may need to change as well.

As labs have moved to new buildings or new locations or partnered with universities or hospitals—and as lab leaders have strategized on such changes—APHL has been helping the process. We've sought out the knowledge of those who have been there to save those moving in the future time and resources. These lab directors and other lab leaders shared frankly what worked for them and their colleagues and what they wish they'd known.

A lab move can bring changes in every aspect of a lab, from day-to-day customer service to the culture of the work environment. I hope these tips and ideas will help ensure these are all changes for the better.



Executive Director, APHL

### If you're not planning a move right now, consider this:

During daily, routine lab operation, you can do a few simple things that can make any eventual move much easier:

- Write potential moves into contracts: When you buy new equipment, do a reagent rental, or even get a computer printer, you can bargain to have future costs for moving, setup, verification, and more written into the purchase or maintenance contract.
- Start a waste control program now, such as getting on a regular cycle for consolidating and discarding chemicals.
- Take inventory—and establish an inventory updating plan.
- Think ahead—start asking questions well in advance of the move.
  - What should I look for when choosing a moving company?
  - How do I motivate the staff to get things moving?
  - How do I make sure everything ends up where we want it to go?
  - What do I do about security with all these people going in and out?
  - How do I make sure lab clients know where to send samples?
- Can an equipment vendor handle the whole move?
- Who's the first person to contact in a move?
- How can I keep samples safe during the move?
- What about validation in the new space?
- Do I have to do an inventory before the move?
- There are dozens of overlapping regulations about how different parts of the lab need to be handled. How do I track them all?
- What's the biggest thing to look out for at the new location?

## Section 1: Advance Prep

Advance prep should start a year out from the move, according to those who have been there. What do you spend that year doing? The top priorities: ensuring funding, enlisting movers, preparing staff and clients, and minimizing the amount of things you need to move.

- **Who's done this before?** Check with APHL to see who has moved a lab recently. Contact members from this book or the list for advice. And look back in your own lab's history—you may have an old procedures manual that can help.
- **Consider a consultant:** A moving consultant can manage planning, coordinate different types of movers and vendors, and more. If you're interested in going this route, you may need to wrap the consulting costs into your funding requests. It will probably require a separate RFP and bid.
- **Select agents come first:** Select agent compliance can be time-consuming and require advance work along with a lot of follow-through, so plan this aspect into the move from the start.
- **Call a committee:** Establish a moving committee with representatives from all areas of the lab. Individual labs (veterinary, environmental) may want to have small committees as well. Committees should have short meetings on a regular basis. (You'll need to plan for how you'll cover staff time while committee members are busy.)
- **Appoint a "move czar":** You may want to name a central person on staff to coordinate the move or to work with consultants, movers, and vendors. This person would also arrange moving committee meetings and communication.
- **Throw it out:** Just as it is when moving to a new house, the less you have, the less you have to move. Start culling early—setting weekly goals on how much you can clear is a good idea.
- **Spread the word:** Set up an internal and external communications plan with clear messages; see the Communication Tip Sheet on page 12 for more.
- **Review your safety manual:** You'll want to be familiar with what needs to be done to close out the old site and to start creating procedures for the new site.
- **Who you gonna call?** There are lots of professionals who can help with the move. Many labs choose a combination of traditional office movers to deal with the basics, vendors to move specialized equipment, and lab moving professionals to take care of everything else. Your state regulations or RFP for the move might give other stipulations. See the [Mover Tip Sheet](#) and [Vendor Tip Sheet](#) (both on page 13) for specifics on how to tap these resources.
- **Perfect timing:** The length of time your move will take will depend on factors such as lab size, complexity of the organization, and distance of the move. Though it's tough to predict exact timing, the more thorough the planning process, the better you'll be able to determine the length of time to allow. Successful lab moves often make use of a project management

## QUICK TIPS

### Start online

Many academic and university lab sites publish lab move procedure manuals online. Search here and on moving company/vendor sites for moving tips and checklists.

### Cleanup contest

Hold a “throw it out” party every month for six months prior to the move. It can be a day or just a few hours. One lab had a contest to see which department could get rid of the most unused item type: binders, journals, papers, boxes.

### Get a bigger dumpster

Consider renting extra dumpsters, particularly one or more devoted to recyclable materials. What you'll pay in rental and dumping fees is far less than what it costs to move unneeded items, lab directors say.

### Long weekend

Think about moving over a holiday weekend, when demand for lab services won't be as great.

### Give it away

Have someone on the moving committee identify opportunities to donate unneeded equipment, books, and other materials to nonprofits.

### New cards

Be sure staff get new letterhead and business cards with correct addresses in advance of the move.

calendar that assigns relative time spans to make it possible to shift specific start and end dates as needed. One way to start this is to use a spreadsheet with each column as a day, covering at least a year. Make a list of every activity needed in the move, from contacting Select Agents to disconnecting the phones at the old location, with this booklet as a guide. Assign each of these tasks a row. Then determine how many days each will take, and put this time span into the time of year it needs to occur. You'll make adjustments and assign specific dates to this grid as you know more. See the [Appendix](#) for a sample.

- **Staffing survey:** Start planning for staffing shifts and extra time needed to keep testing capabilities going during the move. One idea is to have existing staff oversee the move, and add on staff during crunch time to do testing.
- **Size up the job:** More important than square footage is the number and types of functions within the lab. A state lab could house an infectious disease laboratory, an environmental laboratory, a toxicology laboratory, a forensic laboratory, a veterinary laboratory, and the office of the medical examiner. Each of these functions may present its own challenges ranging from differing regulations to different workplace cultures. As you bring stakeholders together to plan the move, track these differences to anticipate where you'll need to adjust and add extra time or care.
- **Get an accurate count:** Take a complete inventory of equipment and supplies prior to the move. Your movers need to know what they are moving and what needs to be handled by vendors because of warranties. This is also a good chance to determine what new equipment you need and what is underused.
- **Emergency procedures literacy:** How well-versed is lab staff on emergency procedures? Will you need to provide training or materials before the move to make sure everyone's prepared? It's always safest to prepare for the worst.
- **Change your SOPs:** Have you been looking for a chance to improve security procedures, make a policy



about smart phone use, or start new workflow regimes? A lab move is a great time to leave behind the old ways and establish new procedures, policies, and habits. Get blue-sky thinking about these issues started early, get all stakeholders involved, and start communicating new policies ASAP.

- **Opportunity knocks:** A move is an opportunity for people to step up and show what they can do. Staff can demonstrate their management chops by volunteering for the moving committee or taking on other tasks. Supervisors may want to look beyond the “usual suspects” when choosing staff for these temporary yet important positions.
- **Keeping compliance:** A good idea is to create a regulatory compliance guidebook for the move. Designate a section for each agency, and compile all regulations (or links to regulations) pertaining to that agency that the move might trigger or affect in this single place. Include deadlines, names of responsible supervisors, and contact information if possible. See the Appendix for [sample pages](#).
- **No vacations for the duration:** Notify staff of “leave blackout” dates, when they should avoid taking time off. Also, be sure everyone understands the policies on overtime and comp time during the move.
- **Dispose of properly:** You know the regulations about disposing of biological and chemical materials. But disposal of anything in the lab, from paper records to computer equipment, may be subject to regulations. Research and share instructions with all staff before they begin paring down so they will stay in compliance.
- **Accentuate the positive:** Change can bring anything from management difficulties to actual delays and difficulties in reaching goals. Keep a positive tone in your communications and planning, and this will set up the new workplace for success.
- **How old is your lab?** The California state lab needed to move a specimen collection it had amassed for almost 100 years. The longer your lab has been in one place, the more challenging its elements can be—items both valuable and disposable.

### Get in there fast

Time your move and get move funding in advance so the new location does not sit empty. Here are a few reasons why:

- The clock starts ticking on the property warranty. If you wait to get in, problems may not be covered.
- You won't discover problems with air handling, humidity, etc., until you're in the building every day.
- If you let time go by between initial installation of equipment, autoclaves, etc., you may end up re-validating, recommissioning, and re-testing.
- The personnel you need to help you might not be available later.
- Insurance costs can be high on unoccupied property.

## Section 2: On the Move

With a laboratory move, smooth and consistent progress and right-on-time accuracy isn't just convenient and cost-effective. It's critical for safety and maintenance of urgently needed services. The chief consideration on actual moving days is to keep moving—safely. Therefore, the more obstacles you can anticipate and provide for, the better the move will be.

**Consider a pre-move:** First, move everything not being used on a daily basis so you can focus, the day of, on essential testing equipment.

**Arrange for redundancy:** For critical services, such as rabies and biochemical testing, some labs set up redundant testing sites in advance for the duration of the move.

**Mobile workforce:** As the move gets closer, more people may take home laptops and other devices, as well as printed materials. This may include people who haven't taken devices home in the past. Is everyone versed in information security policy? Does your policy need to be updated and re-communicated?

**Timing:** Every lab function has at least a slight lull—a time of day when not as much work is coming in. Coordinate the time you unplug and move the essential equipment during this lull to minimize downtime.

**Maintaining:** Be prepared at both old and new locations in case there are problems with the basic infrastructure. Here are some specialists to consider having on-site or on call: Electrician, plumber, elevator repair person, security system maintenance person, HVAC repair person, and IT specialist.

**New vs. old:** Most labs practice good preventive maintenance and can keep much of their equipment for a long time. However, there can be some advantages to timing new equipment purchases at the time of the move:

- New equipment can be set up and validated in advance at the new lab location.
- You can reduce charges for breaking down and moving equipment. There may be disposal charges for the old equipment, however.
- Vendors will be in the vicinity and can consult on both new and moved equipment.
- New equipment costs can sometimes be wrapped into the overall request for funding, leading to savings in both time and paperwork.
- “Something always breaks” during a move, as one lab director says.

### QUICK TIPS

#### Color-coding

In addition to color-coded labels on boxes, you can coordinate color-coding with calendars, task lists, and even emails. You'll be working with these categories for at least a year, so it's worth devising a quick and easy way to get the right people to pay attention to what they most need to see.

#### Carry-on

Each staff member can pack a “go bag” or box with what will be needed as soon as they get onto the scene at the new lab.

#### Rush hour

What are the rules for moving trucks with chemicals and biohazards? Will they need the road to themselves? You might want to plan your move for a time of day (or night) when roads are least busy. State police could also be very helpful in securing the in-transit portion of the move, especially for select agents and other high consequence materials.



## QUICK TIPS

### Hot issues

What time of year are you planning your move? Could high temps make it hazardous to move the infectious disease collection? To avoid high-noon travel, switch your move time to early morning or night hours.

### Contact

With potential security considerations in mind, consider downloading any contact lists on your desk computer to your personal digital device.

### Plug it in

Lab directors point to electrical outlets as a major challenge at the new site on moving day. An electrician, they say, was the handiest person to have on-site.

### Write on

Be sure you have a good supply of permanent markers on hand.

**Take two:** If you have duplicates of any pieces of equipment, consider moving one to the new site and getting it set up and validated, so testing services can continue—more slowly, but uninterrupted.

**Chain of custody:** Special rules apply to moving forensic lab materials. You might have to complete a chain of custody, use special evidence seals, or have materials physically escorted to the new location by staff or an officer.

**Select agents:** A certified select agent technician will need to escort the select agent inventories to the new location. Be sure to program in time and space for these tasks.

**Cleaning the old site:** Decontamination of the old site presents its own set of difficulties and requirements. Determine who must be responsible and what resources you'll need to get it done. How will you handle decontamination of any biological safety cabinets being left behind? How will you address chemical fume hoods or chemical residues, and any real or potential radioactivity? These activities may need to be coordinated because different contracting with companies may be required in order to carry them out. Lab directors recommend using a decontamination checklist for every room. Creating a guidebook to communicate state and federal regulations on decontamination is also valuable.

**Moving vehicles:** If movers use the same vehicles for specialized lab equipment as basic office equipment, regulations (and the moving company) might require vehicles be decontaminated. Some labs have found that equipment also needed to be decontaminated before loading onto trucks.

**Validation issues:** A person from the right lab program will probably need to be on-site when the newly moved equipment is validated. Be sure to plan to cover the time this will take from this person's regular duties.

**Label protocol:** Labeling takes some thought and adjustment. Your mover may have a procedure in place you can adjust or follow. (See the samples in the [Appendix](#) for ideas.) In general, it's better to give each staff member a number rather than labeling by name. Labels should include the employee number and the room number and floor to which the box is destined. Assign each department a label color, and use an additional label to indicate expensive and sensitive items.

**Security issues:** With unfamiliar people coming and going during a move, security can be a challenge. One way to handle this is to have a strict sign-in/sign-out policy, for staff as well as visitors. All staff should have IDs visible at all times. It is helpful if movers are easily identifiable with uniforms or other forms of ID as well. Communicate how new alarm and security systems work.

## Section 3: Settling In

The move isn't over once you get into the new facility. In fact, it can take up to a year to "shake down" the new space. Temperatures, security, lighting, traffic flow—all can be challenges that don't show up right away. For these reasons, it's a good idea to keep your moving committee operational for a while. It gives people a place to take their concerns and a familiar group that can deal with them.

**No. 1 issue:** Air handling: Every U.S. lab move in the past few years has encountered difficulties with air handling. Problems with the HVAC system go far beyond comfort and energy efficiency. Temperatures and ventilation tie into security and safety issues as well. Labs directors who have moved recommend testing air-handling systems before moving in if possible.

**No. 2 issue:** IT: Everything from phone lines to computer connections to equipment depends on the IT staff. Aligning its work with lab functions is critical for smooth operation. Reach out to IT personnel and providers to ensure their concerns are being met. Given that IT tends to be centralized these days, you will want to plan for this well in advance.

**The fine print:** Check the warranty on your new property to be sure it's active for a full year from the time you actually begin using the lab. Each season will bring new issues and obstacles, and you'll want to be covered throughout them all.

**The human factor:** Getting people comfortable in the new space is important as well. Lab workers and clients alike may face issues and changes of habit that can slow down work and contribute to confusion. Expect a certain amount of slowdown and help people set priorities.

**Meanwhile, back at the old place:** Provide for time for a staff member to visit the old location, even several times a day at first, to check for mail, visitors, and packages. Don't be surprised if people keep sending specimens to the old location, for several months or longer, even if your "we're moving" communication was stellar. Post signs in every window of the old location, so delivery service providers will see that you're in a new spot.

### QUICK TIPS

#### Lost?

Make a lost-and-found room at the new location and let staff know where it is.

#### Complaint box

Create a Problem Resolution Form staff can use (see the pre-move packet in the [Appendix](#) for an example).

#### Empties

Empty boxes can be a big headache. Determine a central location to which they can be delivered, and communicate this. If you want boxes broken down, let folks know.

## Resource Links

**Many universities have lab moving guides. Here are links to a few:**

University of Washington:

<http://www.ehs.washington.edu/manuals/lsm/lsm.pdf>

University of Louisville:

<https://louisville.edu/dehs/policies/Lab%20Safety%20Move-In%20Guide.pdf>

University of Wisconsin:

<http://www.ehs.wisc.edu/ehs-laboratorymovechecklist.htm>

Vanderbilt University (includes postable fact sheets):

<http://www.safety.vanderbilt.edu/waste/lab-move.php>

*Lab Manager* magazine has published several articles on moving and setup:

<http://www.labmanager.com/?articles.view/articleNo/3120/article/Moving-Laboratory-Equipment>

<http://www.labmanager.com/?articles.view/articleNo/4757/>

<http://www.labmanager.com/?articles.view/articleNo/3268/>

## Communication Tip Sheet

- Your most important job is to communicate to lab “customers” that you have a new location. Imagine the scenario of an agency getting a white powder letter and showing up at a vacant building—it’s possible, and the damage done could be significant. Communicate the details about your new location as often as possible. Start about six months ahead of the move, and continue to drive the message home.
- Consider having an endnote/signature at the bottom of staff emails that gives move dates and new contact information.
- Send out a moving announcement to all clients well in advance of the move, and tailor it to individual clients and departments. On the first email, ask what they will need or if they have any concerns. This saves on second-guessing and further alerts them that the move might affect the level of service.
- Some services, such as dairy products testing, are done on a set schedule to meet federal requirements. Give these lab clients a heads up and an opportunity to adjust their schedules with the lab to keep service uninterrupted.
- Create a newsletter for internal use. This can be both email and print. Let people know what different parts of the lab are doing, create a countdown to moving days, list tasks to be accomplished, spread the word about recycling, and consider putting in funny tips or photos to make it interesting and readable.
- Use your move committee members as liaisons to communicate with internal departments and divisions. Depending on your communication department’s strategy, the committee can help with external communication as well.
- Create a welcome packet for the new lab location with information about the new neighborhood, getting around, public transportation, any parking or walking considerations, etc. This can be posted on the lab network and printed for staff.
- Don’t forget other types of public contact. Let people know the move will be happening at least three months in advance with a notice on your website home page. Remember to update all pertinent pages with your new contact information. If you use template fax forms or other types of PDFs, be sure to update these as well. Update all recurrent and routine template form letters and emails. Make staff responsible for changing outgoing voice mail messages at least a month in advance.

## Major messages

Internal or External?

**(E, I)** We'll do everything we can to keep services going, but it's inevitable that we're going to be at a different level of service during the move. Please adjust and triage your expectations accordingly.

**(E, I)** Maintaining safety and security is the primary goal in this move.

**(E, I)** We're moving, and we'll have new phone numbers, address, and emails. Please note our new contact information.

**(I)** This move is an opportunity. If you'd like to change something—from procedures to your position—this could be a time to help make that happen.

**(I)** The move committee wants to hear your ideas about how to make this work in the best possible way. (Then give the opportunities to communicate with committee members.)

**(E, I)** Our goal is to continually improve quality. This move is part of accomplishing that goal.

**(I)** The more we get rid of now, the less we will have to move.

**(E)** We are interested in hearing about your experiences with labs that have moved.

## Vendor Tip Sheet

To keep the accuracy—and the warranty—of a piece of specialized equipment, you'll most likely have to involve the equipment vendor in the move. Vendors, in fact, can be a top resource in a lab move.

If you have several lines from several vendors, it could get confusing; a specialist in lab equipment moving can manage and coordinate all vendors for you.

A vendor can also be involved only at the breakdown and setup stages; a moving company can actually take the pieces from place to place. This can save money, but savings in that area must be weighed against other factors.

## Mover Tip Sheet

Companies of varying degrees of specialization can manage different parts of your lab move. Some labs take an a la carte approach, choosing different companies for different functions; others hire one company to manage it all.

- The most important element in choosing a moving company, lab directors agree, is track record. Check out movers' history, referrals, and recommendations. Tap into colleagues at academic labs and hospital labs for recommendations as well. Finally, do a quick online search for any red flags about business stability.
- Companies that bid for the move will come to the lab to get a look at the operation and talk to people. Take time to see what they do—do they visit all parts of the lab if you're a multi-agency lab? Are they equally interested in the freezers, the computers, and the sensitive lab equipment? Do they understand how to work with select agents and/or forensics and evidence?

- Your movers will need to work closely with supervisors and even some staff in all sections of the lab. Are they willing to become part of your planning, offer help, and meet with people throughout the lab to hear their concerns? A day spent listening and evaluating needs can save time and money later.
- Lab equipment specialist movers manage the equipment move, contacting manufacturers and vendors and arranging for all equipment to be disassembled as needed, moved, and reassembled properly at the other end.
- Office movers can pack for you or move boxes employees have packed; they handle basic office materials and furniture.
- Hazardous materials specialists manage biosafety aspects of the move. Clearing clutter and making contact early in the process may get you some help with the pre-move disposal of chemicals, specimens, and other excess. One caveat: Hazmat or biological specialists don't usually have the expertise to handle other moving needs.
- Find out who will handle IT moves and how. Movers can offer a range of services from moving and setup to consulting with staff IT. Align any mover services with existing lab IT staff and vendors, and be sure to get input from these stakeholders before making decisions.
- Ask how movers handle communication on moving days. When staff or supervisors have questions or need help, what's the procedure? One moving company, for instance, has its staff wear uniforms and carry radios, and lab people can ask any question of anyone on the moving staff.



## Costs and Budgeting Tip Sheet

Lab directors who have made the move recommend planning for moving expenses first thing in the process. They say keeping moving expenses separate from the costs of designing, building, or retrofitting a new space is not a good idea. Instead, adding the moving costs to the overall budget request can prevent having to go back for more money later.

Moving costs themselves can involve surprises. Here are some unanticipated expenses lab directors say to watch out for:

- Do you need extra staff or pay to cover ongoing testing while existing staff members are busy with the move?
- Is verification cost coverage written into your equipment contracts or reagent rental contracts?
- Do you need extra staff or pay to cover time taken for writing RFPs, choosing a moving company, or consulting with IT?
- Will there be charges for redundant sites for critical lab testing?
- Who will be responsible for decontamination of the old site, and what will be the costs and staff resources needed?
- Will you need a small fund for staff incentives or food during the move?
- What will it cost to develop materials for staff and clients about the new location—mailing notifications, invitations to an open house, a new safety manual, etc.?

## Sample Procedure for Expensive and Sensitive Items

1. Mark the item or box containing the item with a color-coded label used to identify expensive or sensitive items.
2. Use a color-coded label in addition to the standard label used to identify the delivery location to the new location. Place the color-coded label below the standard label and make it easily visible.
3. Complete the log sheet for each item requiring special this special tracking.
  - a. Mark the box number on the log and label [see naming convention].
  - b. Record who packed/prepared the item.
  - c. Record the date, time, truck number the item is transported on.
  - d. Record who unpacks the item and the date.
  - e. Record any comments or observation appropriate. [Lost, broken, etc.]
4. Use the information for filling claims with the Movers/Risk Management
5. Label naming convention – e.g. M 326 04. [Adjust these to reflect your lab's needs.]
  - a. Program designation:
    - B – Management Services
    - P – Director
    - M – Microbiology
  - b. Next is destination room number at new location
  - c. Last is a sequential number, 01, 02, 03, etc.

**Sample Tracking Sheet**

Box #	Packaged by:	Date:	Truck #	Date/ Time loaded	Contents	Unpacked by:	Date:	Comments

## Sample Regulatory Guidebook Instructions

### CDC select agent

CDC's Select Agent Program: Requires us to have an inspection BEFORE we move in.

They will need to have the paperwork for our BSL3 Commissioning and all other paperwork to register the new building and then they need a six-week period to schedule an on-site inspection.

### FDA

Notify FDA/FERN of new address and telephone number

Update Elexnet

### CLIA

Notify regional office of the change in location 30 days before the move.

They won't need to inspect us until after we move in, probably at our regularly scheduled inspection around [DATE].

### USDA

They will inspect us sometime after our move and after we have our select agent inspection.

We will need to apply for two new USDA permits probably two months before we move so that the new address is on our permit right after we move.

### CDC other

The following steps for establishing a new laboratory workstation must be followed:

Notify CDC of new address and telephone number

Update LRN Messenger

Set up the new Analytical Method Workstation (including IT services)

Establish an analytical method operation (acceptable IBs,LRBs)

Determine that the operation is contamination free (clean Method Blanks)

Perform validation studies, with minimum 20 analyses

## Sample Move Notification Letter to Lab Clients

Dear Valued Customer,

The [NAME] is pleased to announce that we will be moving to our new laboratory facility [MONTH, YEAR].

Effective January 19, 2010, our new contact information will be:

NAME

ADDRESS

PHONE

Driving Directions:

We are committed to making this transition as seamless and transparent as possible. If you have any questions or concerns, do not hesitate to contact us by email (ADDRESS) or telephone (NUMBER).

We appreciate your business and thank you for your continued relationship with [LAB].

Sincerely,

[LAB DIRECTOR]

[Including a link and printout of a map of the area of the new location is extremely helpful.]





## Sample Staff Information Packet for Pre-move

*[This is a sample of what can be useful as a general information sheet for all staff. Your material should be adjusted according to your mover and lab requirements.]*

The intention of this packet is to provide answers to key questions as you plan, prepare, move and ultimately unpack in the new lab. If we have overlooked something, please let us know.

### Communication

Additional communication regarding your move can be found [give location on lab computer network]. This folder has been set up to keep you up to date on the latest information regarding your move.

### Moving Preparation: Mover's Responsibilities

Disassemble freestanding furniture (desk with returns and conference tables and other furniture included in the moving agreement) so it can be moved safely.

Pad and protect computer equipment, printers, typewriters, lamps, and other equipment and place on stretch-wrapped carts.

Provide building protection, including door pads, wall and corner padding and protective floor covering at origin and your new location. Protect elevators if building management does not provide protective padding.

Move all **labeled** furniture, cartons, file cabinets and electronic equipment from present location to new location and place in new offices according to diagrams and labels.

Any item taken apart by the mover will be reassembled at destination.

### Moving Preparation: Our Responsibilities

Pack all personal offices, cubicles, common area, storage or kitchen areas, bookcases, storage cabinets and loose materials into cartons; including lamps, sculptures, and fragile items. Close cartons securely with tape. Do not over-pack cartons.

Decontaminate all equipment and furniture prior to moving.

Disconnect computers, keyboards, printers and office equipment. Place keyboard and all power cords in the provided plastic bag and label the bag accordingly.

Remove pictures, maps, bulletin boards from walls and label.

Move any personal items from offices including: plants, pictures, statues, plaques and knick-knacks.

Lock desks and file cabinets and secure keys in safe location.

Unpack contents of offices, cubicles, common areas, and set up. Hang pictures, bulletin boards, etc. and reconnect all computer and electronic equipment.

### **Pre-Move Coordination**

[NAME] is the move coordinator and works directly with your bureau director to assist in your move. If you have questions regarding your move, please contact, in this order, your 1-Direct supervisor, 2-Section Chief, 3-Bureau Director, 4-move coordinator.

If your supervisor is unable to answer your question, feel free to move up the line.

**Any and all questions should first be addressed to your supervisor.**

There will be a series of informational meetings (all hands and by Bureau/section) beginning in [SIX MONTHS PRIOR] continuing to just before the moves begin.

The following items are currently being coordinated for your move through the Move Committee:

- Mover coordination
- Coordination with IT for phone and fax moves
- Coordination with IT for computer and printer moves
- Copier move schedule
- Packing boxes pick-up and delivery
- Card Key Information
- Key access to the building
- Records storage
- Clean-up before and after the move
- Lost and found
- Surplus of non-used furniture and equipment
- Problem solving

## Lab Protocols

### OVERVIEW

Anything you can do to reduce the amount of reference materials and supplies will contribute to a smoother, more expeditious move.

### PREPARING THE LAB TO MOVE

**Lab staff** is to remove and take home all personal items (plants, photos, desktop amenities, awards, etc.). Vendors will not be held responsible for personal property.

**Lab staff** is to pack and label laboratory dry supplies. Boxes will be provided. Be careful and follow the safety suggestions for lifting.

(For details on chemical packing and responsibilities, see HAZMAT Procedure. This will be forthcoming based upon what chemicals are currently being used.)

**Lab staff** will pack and label breakable supplies and glassware.

**Vendors and Movers** will pack lab equipment as identified.

**IT** will not disconnect workstation, printers, etc., unless a remedy ticket is created. If there are computers that are beyond the ability of the user to move, it would be appropriate to call IT. It is better for us overall to do as much as possible to give IT the time to set up our equipment at the new location.

**Movers** will move computers, monitors, and a bag that contains the keyboards, power strips and mice together. DO NOT pack these items separately or put them in a box. This makes reinstallation faster.

### DECONTAMINATION

Any equipment or area having biological or chemical contamination must be appropriately cleaned and decontaminated with 10% bleach, mild detergent or according to the manufacturer's decontamination instructions, before any items are moved. (GIVE FURTHER INSTRUCTIONS OR REFERRAL TO LAB PROTOCOL MATERIALS HERE.)

### CALIBRATION | CERTIFICATION

Once moved into the new lab, **Lab Staff** are responsible for making sure their equipment is fully re-calibrated and certified for use.

*Please confirm when outside vendors need to be on site to pack, unpack, and re-calibrate as needed!*

### MOVING

**Lab staff** is to unpack lab supplies and boxes. No state-owned equipment or supplies may be transported in private vehicles.

**IT Staff** will reconnect computers. DO NOT attempt to plug anything into jacks.

**Specific details will be made available closer to the actual move.**

## General Guidelines

### Preparation/Move Process

The following is a list of items that you will be responsible to coordinate. If you have any questions or concerns, please contact your section supervisor.

You should begin the process of recycling as soon as you can. On the day before your move you should be packed by [TIME]. At this time your computers and phones will begin to be disconnected. The next day movers will begin staging. There will be a person assigned to cover your area if the movers have questions. Floor plans of your space in the new lab will be posted prior to your move to give you a sense of where you will go to in your new location.

### Recycling: 'Move the Right Stuff'

Now is the time to recycle all of those unused items. Recycle bins are available [LOCATIONS]. Unused items such as batteries, hazardous fluids, etc. should be coordinated with [SUPERVISOR]. Reusable office supplies such as 3-ring binders, hanging folders, etc., should be collected in a common area for distribution to others as needed then surplus.

### What Should I Pack?

Pack everything you will need: manuals, books, desk supplies, etc. Empty all furniture before the move. If there is a file cabinet [lateral files must be emptied to the bottom drawer others can be moved full] or bookcase in your workstation, you will be responsible for packing it. Your Section chief will instruct you regarding shared items or common areas.

Put pencils, pens, paper clips and all other small items in an envelope or zip lock bag and place it in a move box. Using labels provided by to your area, label wastebaskets, footrests, monitor stands and other special equipment.

### Personal Items

Please take all personal, fragile, and breakable items home before the move. The movers are not responsible for damage to these items. This includes (but is not limited to) personal plants, pictures, toys, knickknacks, wall hangings, coffee pots, heaters, fans, hot water machines, toaster ovens, etc. We would also suggest that you take cell phones and pagers home with you during the move.

NOTE: Please take your personal items home, preferably two to three weeks before your move. This keeps your personal items safe and leaves the movers free to move business items only.

### Box-Packing Instructions

It is important that you utilize the proper coded labels for your move.

This will insure your items are moved to the correct location and at the proper time. Mark labels with your new workstation address. Plans will be posted on your current floor and a listing of the new workstation addresses is included in this packet. The placement of your items

in your new workstation or bench will be done with a WORKSTATION NUMBER, not by name.

A SPECIAL LABEL is optional for fragile or expensive items you wish to track closely. Using these labels requires extra documentation. See the Tracking Expensive or Sensitive Items procedure.

**QUESTIONS: ASK! ASK! and ASK AGAIN!**

1. There is no such thing as a stupid question.
2. Assumptions are lethal.

## **Day of the Move**

If you experience any problems with your newly set up computer, please contact one of the IT staff who will be present.

If you have any phone problems, contact your section supervisor.

Mail on [DATE] will be delivered to the new location.

If you find something missing, not working, etc., go to [CENTRAL LOCATION] and write it on the white board with your name and location.

Begin to keep your access card with you at all times due to the increased use of proximity readers in the building.

Empty, flattened moving boxes should be placed [LOCATION].

## **Post-Move Information**

On [DATE], you will be able to access your new space **after [TIME]**. There will be staff at the lab to show you around if needed. Workstation and lab area location maps will be posted and workstation and lab areas will be numbered.

## **Lost and Found**

There will be one location designated as a Lost and Found room. If there is something that did not get moved or labeled for moving, please use a Problem Resolution Form as described below.



### **Empty Boxes**

The movers will make an empty box pick-up one week after the move. Your empty boxes should be flattened and returned to [LOCATION].

### **Miscellaneous Items**

On your desk or bench, when you arrive at the new lab, you will find a package of information about life in the new lab and the area. Please review it. For any other questions after the move, please contact your manager.

### **Problem Resolution**

You will find a Problem Resolution Form on your new workstation desk. If any issues arise, such as missing or damaged items, etc., please fill out a Problem Resolution Form and turn it into your Bureau Director. Problems will be addressed by the Move Committee and assigned a priority. The Move Team will then forward the issue to the appropriate party for resolution.

### **In General**

We understand this is a substantial change for everyone moving. As your Move Team, we have worked hard to minimize the impact on you. Before we embark on any adjustments to the workspace, we encourage you to take the time to settle in. This also means to hold off bringing back personal items for a couple of weeks.

## Sample of Packing Instructions

**YOUR MOVE WILL BE HANDLED EFFICIENTLY AND EFFECTIVELY**

**IF .....**

**YOU CAREFULLY FOLLOW THESE INSTRUCTIONS**

EMPLOYEE NAME: \_\_\_\_\_

NUMBER: \_\_\_\_\_ LABEL COLOR: \_\_\_\_\_

Placement of your lab and office furniture at the new location is **done by number, NOT BY YOUR NAME.**

Your moving number is listed above. **Items without labels will not be moved.**

Your section Chief will supply all labels.

**MARKING:** Label each item. If an item must be dismantled to be moved, be sure to label all parts.

### PACKING INSTRUCTIONS

**DESKS** and **CREDENZAS** (Label the desk on the top surface)

- 1) Pack all contents of Desk/Credenzas.
- 2) Be sure to label both the desk and return on the top surface, as they become separated for the move.
- 3) Place small items (pens, clips, etc.) in an envelope or ziploc bag and place in moving boxes.
- 4) Breakable items and liquids such as in glue, etc. should be well wrapped and placed upright in moving boxes and marked FRAGILE.
- 5) File holders, in-out baskets, or other large items that won't fit in a box should be labeled and left unpacked on the top of the desk or bench.

### GLASS TOPS ON DESKS

Place label on lower right-hand corner and remove all paper from under the glass.

### CHAIRS

- 1) Place a label on your personal desk chair in a smooth, clean, easily seen area. **LABELS DO NOT STICK TO FABRICS.**
- 2) It is better to have a label on the base of the chair where it sticks than to have the label fall off.
- 3) Visitor, conference table, and waiting room chairs may be tagged to go to different areas. Please do not tag them.

### **TELEPHONES**

- 1) DO NOT PACK YOUR PHONE WITH YOUR PERSONAL ITEMS.
- 2) Disinfect your phone, unplug it from the cord, and place it with computers.

### **COMPUTERS: PCs and MONITORS** (Place label on top or in front.)

- 1) Disconnect all cables from the wall [you may leave the cord if it connects to the wall behind furniture or equipment that makes it difficult to retrieve].
- 2) Unplug all cords and cables from the PC, monitors, and peripherals.
- 3) Place all cords and cables into a large bag and label the bag with your destination number.
- 4) Place a label on all components: CPU, monitor, keyboard, speakers, etc., and local printer, if it will be moving with you.
- 5) Refer any questions to your Section Chief.
- 6) Do not pack your computer equipment in a box. IT staff will reconnect your computer and associated equipment. When you arrive on Tuesday, your equipment will be up and working. IT staff will be on site to assist with any problems, concerns, or questions.

### **PRINTERS: PARTS** (Place label on either front or top of each piece.)

- 1) Remove trays and tag.
- 2) Remove toner cartridges and pack separately.

### **BOOKCASES** (Place label on either side or front.)

- 1) Pack all contents of bookshelves.
- 2) If individual shelves are removable, label each shelf.
- 3) Remove pins or clips that hold the shelf up, place in an envelope and pack in a box.

### **OTHER MACHINES** (Place label on top or front)

- 1) Unplug and roll up all non-detachable cords.
- 2) Pack machine's covers in containers provided.
- 3) Remove detachable cords from the machines and pack in labeled containers.

### **LATERAL FILES** (Place label on top drawer)

- 1) On three, four or five drawer file cabinets, only the bottom two drawers may be full. All other drawers must be empty.
- 2) Two drawer file cabinets can be moved full.

**VERTICAL FILES** (Place label on top drawer)

- 1) Be sure all pressure plates are moved forward so contents are secure.
- 2) Lock cabinets, remove keys and take keys with you. Do not leave the key in the lock.
- 3) If no keys are available, wrap tape around lock cylinder so the file can't accidentally be locked.
- 4) Vertical file cabinets can be moved full.

**LARGE SUPPLY CABINETS** (Place label at top of door)

- 1) Remove all contents and place in packing containers.

**PACKING BOXES**

- 1) Place label on an END of the carton, not the bottom, top, or sides.
- 2) Boxes are stacked when moved. Please do not over pack.
- 3) Items too large to fit in a carton should be labeled and the movers will move them using a cart.
- 4) Boxes are intended for multiple use. It is okay to write brief notes on the boxes. Write on the box, not the label.
- 5) Interlocking boxes do not require tape.
- 6) If boxes you are using have previously been used, remove all old labels or place new labels over old labels.

**EMPTY BOXES**

When you unpack your boxes, flatten them out and deliver them to [LOCATION] for pickup.

**MISCELLANEOUS**

- 1) Label your empty wastebasket.
- 2) Label your chair protector (floor mat).
- 3) Label your recycle bin.
- 4) **SPECIAL HANDLING ITEMS:** Refer questions about unique, one-of-a-kind items to your Section Chief.
- 5) Labels are easily removed. Because of this, they will not adhere to some surfaces. If necessary, place a piece of clear tape over label.
- 6) If you have any questions, please contact your Section Chief.

### **GENERAL LABELING INSTRUCTIONS**

- 1) Every item to be moved **MUST** have a label on it.
- 2) Write only your new location address on the label. Adding names and other information on the label promotes confusion and slows down the move process.
- 3) Any item without a label will not be moved. If you need additional labels please contact your Section Supervisor.
- 4) Mark the labels with the new location number, not as they are located currently.
- 5) Please take your time to write clearly and legibly.
- 6) Be sure to use a **THICK BLACK PERMANENT MARKER ONLY!** Sharpies work quite well. Do not use ball point pens or pencils.
- 7) If you have a series of files or cabinets you want placed in a certain order, mark the sequence by letters. **EXAMPLE:** A, B, C, etc. Use the label designated for your move. Number the label for the area at the new facility and location in the room. There will be room layout maps on each door so the movers know where to place the items. Example: 212-1, 212-2
- 8) Mark all artwork, bulletin boards, calendars etc., remove from the walls, and label with the location number where it is going. Be sure to put all hardware in a labeled envelope or bag.
- 9) PCs, monitors, calculators and lamps should be labeled and left on top of your desk. If cords detach, please do so and place in a bag or in a carton and label with your number. Remember to label each piece of the computer, i.e., keyboard, CPU, monitor, etc.
- 10) Be sure to only use labels designated for your move.
- 11) There will be a lost and found area [LOCATION] at the new facility for anything that was not labeled clearly, missing labels, or where there was any confusion as to its rightful location.
- 13) Obtain labels from your Bureau Director.
- 14) Obtain boxes from [LOCATION].

**SAMPLE LABELING GUIDELINES**

Name: \_\_\_\_\_

FLOOR	ROOM	PIECE



## Accentuating the Positive

This is a humorous list put together by the Iowa lab.

### Things we are leaving behind in the old lab:

Unfinished ceilings	Mouse traps
Cockroaches	Bugs/Snakes
Leaky ceilings & stained ceiling tiles	Sub-basement
Low ceiling pipes	Directions to old lab
Keyed entries	Color scheme in Chemistry lab
Tape	Rusty cabinets
50s yellow furniture	Clanky radiators
Bad air/sewer smell	Distance between labs
Power outages	Paranormal activities
Unnecessary fire alarms	Ventilation throughout building
Insufficient hood space	Spooky spots in old building
Doors that operate as intended	Power/plumbing/ventilation
Nasty flooring	Insufficient housekeeping (dirty floors/toilets)
Asbestos	Lack of/distance of fleet vehicle parking
PA system	
Elevator problems	

## Sample Specifications for Use in RFP

These specifications are stripped and shortened to maintain the confidentiality of the lab that volunteered them. They can serve as a model in creating an RFP; however, remember that standards and requirements will differ for every lab.

### **Move Relocation Specifications for Laboratory**

#### **Part I – Project Description**

**1.1 General Information:** The Laboratory Research Park, hereafter referred to as “Owner”, is seeking quotations for moving services from the existing location to a newly constructed building.

a. The project consists of moving furniture and equipment from various locations in the laboratory to newly constructed building both located on the Research Campus. The current location includes spaces are spread over 5 levels and three wings and moving to three levels, 2 wings each.

b. The following departments and services will be relocated:

- Administration
- Air Quality
- Asbestos
- Bacteriology
- Specialized Labs
- TB/Mycology
- Central Services
- Central Accessioning
- Client Services
- CT
- Environmental
- Molecular Biology
- Environmental Microbiology
- FERN/Chemistry
- FERN/Microbiology
- Finance
- GC Analysis
- HPLC/MS
- IT
- Limnology
- Maternal Screening
- Media
- Radiochemistry
- Radiation Response
- Records
- Serology
- Sample Preparation
- Virology
- Library
- Graphics
- ICN Room
- CLIA
- Offices

c. There will be 1-2 separate moves starting 26 March 2009 through 2 April 2009 for first move, second moves consist of only 1 area at a date yet to be established. See Section 1.3 for anticipated move dates.



**1.2 Project Scope:** Vendor to provide moving services including the following

- a. Attend orientation and kick-off meeting for move. During this meeting, vendor will meet each department's move supervisor, review overall move strategy and other items.
- b. Attend monthly move meetings to review and confirm move specifics for each department. Attend additional meetings with move coordinator and/or staff to address any move issues.
- c. Attend at least one meeting within 10 days prior to each move phase to finalize all moving issues and concerns.
- d. Provide one Move Manager that will work with move coordinator and \_ staff. Once accepted, Move Manager cannot be changed without approval of Owner.
- e. Coordinate move specifics with move coordinator and other \_ staff as designated by move coordinator. The owner and vendor will work together to develop a mutually acceptable plan relative to logistics of moving out of existing facilities and into new facility.
- f. Provide a written plan for each move phase listing move specifics: start location and end location, elevators to be used, move path anticipated, anticipated number of hours for each move phase, quantities of trucks, movers, etc. required; name of vendor's supervisor, plan for protection of walls, -floors, doors, elevators, etc.
- g. Provide assurance of security and confidentiality by having evidence of a criminal background check for all workers; guaranteed oversight by a supervisor at all times; provide agreement that workers will not discuss details of material moved or functions performed at the site.
- h. Provide all labor and materials to physically move all room contents. Provide cartons, labels, tape & dispensers, bubble-wrap, packaging paper, gondolas, book carts, mobile equipment carts, dollies, trucks, vans, security carts, security totes, miscellaneous items, etc. See Part II for additional information.
- i. Protect existing building walls, floors, doors, door frames, exterior walls, dock area, elevators, etc.
- j. Repair and/or pay for any damage caused by mover or move employees.
- k. Obtain any required city permits needed for the move.
- l. Coordinate with other equipment vendors as needed.
- m. Existing location of employees to be moved:**  
Research Campus
- n. New Location:**  
Research Park

**1.3 Move Phases (Subject to Change):** The move will be done in phases. Some work on Saturdays and evenings will also be required

**a. Phase 1 – Majority of Laboratory operations**

**Date:** Friday April 9, 2010 through Friday April 16, 2010

**Move Time: Friday March 26 beginning at 8:30AM each day until section complete**

**Existing location:** Research Park

**New Location:** Research Campus

**Number of employees:** 220

- The moving vendor shall arrive at least 1 hr. prior to each day during the phase to stage trucks, install protective materials and communicate instructions to crews. Exact time to be mutually agreed upon.
- Access at current location includes: the main entrance of laboratory, loading dock located on south side, east entrance; loading dock at Hall on north side and Hall drive through entrance.
- Access at new location: Loading dock on south side.
- Elevators at current location: Elevator “H wing”

Capacity: 4000 lbs

Size: \_\_48\_\_”w x \_\_98\_\_”d x \_\_84\_\_”h clear

Carts	1
Computers	1
Refrigerators/Freezer	1
Freezer	2
Fridge	1
Incubator	1
Microscope	1
Centrifuges	2
BSC:	1
Samples in Coolers	2
Boxes:	25
Victor:	1
Plate washer:	2

- Elevator at current access: Elevator “South wing”  
Capacity: \_\_4000\_\_\_\_ lbs  
Size: \_\_46\_\_\_\_”w x \_\_92\_\_\_\_”d x \_\_84\_\_\_\_”h clear
- Elevator at current access: Elevator 2 “East Wing”  
Capacity: \_\_3000\_\_\_\_ lbs  
Size: \_\_42\_\_\_\_”w x \_\_84\_\_\_\_”d x \_\_\_\_84\_\_\_\_”h clear
- Elevators at new location: EX1 (east elevator)  
Capacity: 4500 lbs  
Inside – 68” wide x 95” deep x 89” high  
Door – 54” wide x 84” high
- Elevators at new location: EX2 (at dock, only services lower level)  
Capacity: 5000 lb  
Inside—70” wide x 95” deep x 89” high  
Door—54”wide x 84” high
- Elevators at new location: EX3 (south elevator)  
Capacity: 4500 lbs  
Inside – 68” wide x 95” deep x 89” high  
Door – 54” wide x 84” high

Security note: Do not block path of traffic access south of the Hall Loading dock.

**b. Phase 2 (if not conducted on in Phase 1) – Special Laboratory**

**Date:** To be Determined

**Move Time:** one day

**Existing location:**

**New Location:** Research Park

**Number of employees:** 2

**Date:** TBD  
**Move Time:**  
**Existing Location:** H wing  
**New Location:**  
**Number of Employees:** 5

Loading access at: \_\_\_ HALL entrance east wing entrance \_\_XX\_\_ Loading Dock

\_\_\_\_\_HALL Loading Dock \_\_\_\_\_ HALL drive thru entrance

Elevator: \_XX\_ H wing \_\_\_\_\_ East Wing

- The moving vendor shall arrive at least 1 hr. prior to each phase to stage trucks, install protective materials and communicate instructions to crews. Exact time to be mutually agreed upon.

- **Access at Hall main entrance**

Elevator: H wing elevator

Capacity: 4000 lbs

Size: \_48\_\_\_"w x \_83\_\_\_"d x \_\_96\_\_\_"h clear

- **Access at :** Loading Dock

Size: 5'-10"w x 8'-8"d x 7'-5"h clear

- **Security note:** security will require additional training for staff conducting this move. Moving staff will be required to work in pairs and will have \_\_\_ staff member present at all times. Additional security will be arranged by \_\_\_ for this move.

## **Part II – Move Vendor Responsibilities**

### **2.1 General Description of Items to be Moved and Moving Process**

**a. Scope of Each Department's Move:**

- It is difficult to quantify the exact scope of each department's move. Some departments have many employees, but few boxes to move. Some departments have few employees, but many boxes and equipment.
- The anticipated scope of work for each department is listed under the Move Matrix (Section 1.3) and in the Departmental Summaries, Attachment B.
- Representative photos are provided to give vendors an example of existing conditions, and types of equipment that will move. See Attachment B1. Vendors will not be able to see every area during the Pre-Bid Walk-Through, and photos will be provided to help with scope.

- The successful vendor will be able to walk through each department as needed prior to move to finalize move equipment, labor, time, etc. needed.
- b. Items to be moved include, but are not limited to:
- Freestanding furniture and equipment such as desks, chairs, conference room tables, file cabinets, carts, shelving, floor fans, heaters, microwaves, refrigerators, shred-alls, etc.
  - Wall-hung items such as photos/artwork, bulletin boards, marker boards, projection screens, etc.
  - Equipment such as lab equipment, and other specialty equipment. Lab equipment includes items such as microscopes, centrifuges, freestanding hoods, lab refrigerators, samples, gas chromatographs, liquid chromatographs.
  - Boxes, mobile equipment carts, etc.
  - A listing of currently scheduled equipment is included. See Attachment D which lists equipment purchased at \$5000 or greater. NOTE THAT THE ITEMS ON THE LIST ARE SUBJECT TO CHANGE. This list will change before the move. Move vendor will be kept apprised of any major changes.
  - Relocation of chemicals will be considered as an alternate. Reduction in chemical volume is ongoing. See attachment C for the current maximum quantity chemical list. This list will be updated again after award.
- c. The moving contractor will coordinate all van traffic, docking procedures, elevator usage and security with the move coordinator. The moving contractor shall abide by the rules and regulations set forth by the building owners. Move vendor is responsible for obtaining any special city permits required for loading, parking, blocking off streets or sidewalks, etc. The owner and contractor will work together to develop a mutually acceptable plan relative to logistics of moving out of existing facilities and into new facility.
- d. Provide moving materials including boxes, color-coded labels, tape and tape dispensers, packing materials, zip-lock bags, bubble-wrap and white paper for packing glassware and photos/artwork, etc. prior to move.
- One-piece fold type, pop-up boxes required. Some 2-part boxes are also requested. Boxes are to be new. Boxes may be recycled, but damaged cartons are not acceptable.
  - Provide large zip-lock bags for computer keyboards, mouse, cords, etc.
  - Provide different color labels for each department.
  - Moving materials to be delivered for each phase as requested by departments, but generally no later than two (2) weeks prior to move date. Some boxes and bubble wrap are expected to be needed earlier. If so, vendor will be notified.

- Provide mobile equipment carts (flatbed carts) for moving some equipment. If these are used, carts must be shrink-wrapped before transporting.
- The move vendor shall arrange to pick up boxes by following Friday of each move phase. The boxes must be recycled and documentation of recycling provided.
- e. The move vendor shall provide two (2) crew members on Saturdays and Mondays following each phase to assist with box retrieval and minor adjustments as needed.
- f. The contractor shall provide adequate protection for walls, floors, doorframes, equipment and furniture. Protect walls, floors and doors/door frames along the move path. Protect elevator cab walls, doors/door frames and floors. Protection materials are to be new or like-new and appropriate for their intended use. Use materials such as ¼" masonite, koroflex, padding, steel plates, door guards, corner guards, etc. Walk-through buildings and along move paths with move coordinator 1 week prior to move to confirm existing conditions. The contractor will provide in his/her response, a description of the specific methods of protection the contractor will provide.
- g. Provide personnel to run building elevator full-time during entire move duration (if elevator is locked off and dedicated for move).
- h. Placement of items in new location:
  - Place all items in room designated on label.
  - If location within room is identified by a "piece number", place in that specific location. If item is not identified by a "piece number", place in room as mutually agreed upon with move coordinator and staff (prior to move).
  - Place all boxes with labels facing out so they are visible on the end of each box.
  - Do not place boxes in front of file cabinets.
  - Whenever possible, do not place boxes on top of work surfaces (eg. Under table or knee space under cabinet or workstation).
  - If box label is illegible, place box in previously designated location for move coordinator to determine correct location. Move box to correct location prior to leaving building at end of move.
  - If equipment/furnishing label is illegible, contact move coordinator for correct location before setting in place.
- i. Desktop computers, printers, copiers, fax machines, and other data equipment. All equipment will be disconnected by staff. Vendor will be responsible for packing/loading equipment and transporting to new location. Computers, printers and fax machines to be blanket-wrapped (each piece individually), placed in a "speed pack" one layer deep, OR placed on a mobile equipment cart and shrink-wrapped for transport. Vendor to advise Owner of anticipated plan.

- j. The move vendor shall furnish all necessary vans, tractor/trailer trucks, drivers, movers, helpers and equipment to perform the move including but not necessarily limited to:
  - 1. Delivery of boxes, cartons, labels, tape, carts and any other items to the owner prior to the move.
  - 2. Transporting all boxes, cartons, carts, furniture, equipment and generally all items scheduled to be relocated from owner's existing facility onto contractor trucks and into final location in the new facility.
  - 3. A normal complement of hand tools including but not limited to: slot head and Phillips screwdrivers, adjustable wrenches, miscellaneous pliers, hammers, tape measure, pry bar, 3/8" socket set, power driven screw driver and power drill for miscellaneous furniture disassembly and assembly.
  - 4. Provide "air-ride vans" to transport any special contents, furnishings or equipment.
- k. The move vendor shall have the responsibility of insuring that the materials to be moved are properly loaded and secured to prevent damage to materials, persons and property in route.
- l. The move vendor shall be liable for all loss and damage to owner's property caused by move.
- m. The move vendor shall be liable for damages to buildings, building fixtures and grounds caused by persons or equipment under the contractor's control.
- n. It is not anticipated, however, in the event that the contractor leaves a vehicle loaded or partially loaded overnight or over a weekend or holiday period, the contractor shall lock and seal the vehicle, obtain written permission from the owner and leave the vehicle in a secured area.
- o. All goods and equipment in care of the contractor under the Agreement shall remain the property of the owner and title of said property shall not pass to the contractor under any circumstances.
- p. All dollies are to have rubber wheels. Confirm all carts, dollies, gondolas provided by move vendor have wheels/casters that are approved for use by \_ on floors
- q. Coded floor plans will be prepared by the owner showing locations of all furniture with identification numbers that will be used on all labels. Move floor plans will be posted at numerous locations in the new facility.
- r. There will be excess furniture and equipment left behind that will not be part of the move. These items will not be tagged with moving tag but will be labeled with a bright red "Do Not Move to New Building, To Be Retired".

- s. The Move vendor will be responsible for keeping any staging areas in a neat and orderly fashion. All move related supplies are to be cleared from the job site at the end of the move - on the same day as move is completed.. Move vendor shall be responsible for the clean up and removal of trash or debris. Dispose of off-site.
- t. Repair any damage to existing buildings, caused by move vendor activity, at no cost to the Owner. In most cases, repair damage within 7 calendar days. If required by Owner, repair work will need to be done between 5 p.m. and 11 p.m. In some instances, damage may need to be repaired by Owner's contractor. If that is necessary, move vendor will be back-charged for the cost.
- u. Conduct post-move walk-through with move coordinator and department move supervisor to review any issues or damages associated with the move.

## **2.2 Specific Requirements**

- a. MOVE DATES AND TIMES ARE SUBJECT to change, as deemed necessary by the Owner. The Owner reserves the right to change the dates as needed. The Owner will advise the Vendor 14 calendar days prior to the RFQ move dates if there will be a change. If advised 14 days prior to the move, the Owner expects there will be no change in unit costs. Vendor to advise if more than 14 calendar day's notice is required to change dates, and if there is a cost to change dates. Vendor will be advised of final move times and strategies 1 month prior to each move.
- b. The move vendor will be required to move personal desktop computers, keyboards, CPU units, printers, copy machines and fax machines as labeled. Two weeks prior to move, the move vendor shall supply large computer bags and labels for keyboards, mouse and cords. Bag will be labeled with workstation number by the owner.
- c. For the movement of IT equipment, which includes pc's, fax, printers, scanners, and mail equipment, typewriters, dictating machines, desk top printers, adding machines, PC's and CRT's will be packed by the movers and moved in special padded bins or boxes which are specially manufactured for that purpose and are provided by the vendor.
- d. Workstation/office contents will be labeled. The moving vendor will only move boxed contents, lateral file cabinets and filing cabinet contents. Only a few pieces of systems furniture will be moved by mover.
- e. There are some heavy pieces of equipment to move. See Departmental Summaries. Provide appropriate equipment to lift and move the items.
- f. The move vendor will be required to move supply room boxed contents, tackboards/whiteboards, waste receptacles and recycle containers as labeled. Supply labor to remove bulletin boards, markerboards, etc from walls and transport. Owner's forces will reinstall in new location. See Departmental Summary for specifics



- g.** The move vendor is to provide labor to shim and level all file cabinets and storage cabinets.
- h.** Where files are to be moved, the contents in vertical file cabinets will remain in place. The contractor shall identify to the owner if any files cannot be moved full. Horizontal file cabinets will be empty when moved.
- i.** Loose items and supplies will be boxed or bundled by the owner and moved by the contractor. The contents of desks, credenzas, storage cabinets, shelves, etc. will be packed by the owner.
- j.** Some materials will require a “chain of command”. Department staff will supervise transportation of specially-marked boxes. See Departmental Summaries.
- k.** The majority of equipment, furnishings and boxes can be packed on Move vendor’s trucks and driven from existing location to new location. Move vendor and owner to review and coordinate.
- l.** There will be some materials in existing refrigerators that will need to be transported quickly to keep the temperatures even. Refrigerated transportation may not be necessary, but quick moves and unpacking is required or alternate of temperature controlled transport provided. List of Refrigerator/Freezer provided in Appendix E. Departmental staff will supervise these moves. Moving in controlled transport will be considered as an alternate.
- m.** Some specialty lab and medical equipment must be disconnected, transported and reconnected by other vendors. A preliminary list of this equipment is listed in Appendix E Specialty Vendor Move. An alternate of moving vendor coordinating all specialty moves is included. A final list will be provided at the time of award.
- n.** Moving of chemical inventory will be considered as an alternate. Moving chemical inventory will require proper packing and handling to ensure safety. Reduction in chemical volume is ongoing. See attachment C for the current maximum quantity chemical list. This list will be updated again after award. See attachment C for the current maximum quantity chemical list.
- o.** Coordination of equipment calibration will be considered as an alternate for weighing balances and Biosafety cabinets that are relocated during this move. See list in Attachment F.
- p.** Value added capability of packing, set up, pre and post calibration at a very minimal benchmark will be considered as an alternate for some analytical instruments, specifically the gas chromatographs and liquid chromatographs including in Attachment D unless listed as vendor specific move in Appendix E.

### **2.3 Laws and Regulations**

- a. The move vendor will comply with all local, state, federal, and OSHA laws, ordinances, codes, rules, and regulations pertaining to this project. The contractor will assume all liability and responsibility for any non-compliance with these codes and regulations.
- b. Any permits or fees pertaining to this project are the responsibility of the move vendor and copies of such documentation shall be forwarded to Owner's Project Manager.

### **2.4 Project Management, Supervision, and Employee Appearance**

- a. The move vendor will assign a full time Project Manager to this project. The Project Manager will attend the owner's move planning meetings and provide input into the relocation process as required and shall be the main contact with the owner throughout the project.
- b. The Project Manager will be onsite during the actual move to direct the overall activities of the moving personnel and to ensure that the move is completed in accordance with the specifications. The Project Manager shall be identified in the bid response
- c. The move vendor is required to have communication devices, ie: cell phones or short-wave radios, as a method of communication between sites and with drivers. Provide mobile phones for vendor's personnel to facilitate communications with move coordinators and Owner's supervisors during move. Move Vendor's move project manager must have a mobile phone. Provide move coordinator with names and mobile phone numbers of all Move Vendor move supervisors, managers, and drivers.
- d. The move vendor shall provide supervision at the existing locations to assist the moving crew in properly locating all items to be order in which they are to be moved.
- e. The move vendor shall provide supervision at the new location to assist the movers in proper placement of all furniture, contents and equipment.
- f. All employees assigned to the project must at all times be attired in uniform shirts or jackets with move vendor logo or name clearly visible. Clothing to clearly identify them as moving personnel. Advise move coordinator of plan prior to move.
- g. Personnel provided by Move Vendor must be bonded. Personnel with criminal histories shall be prohibited from working on this project. Move Vendor to provide names of all personnel working on the project and their roles.
- h. Each move vendor employee will be required to sign a Health Insurance Portability and Accountability Act of 1996 (HIPAA) confidentiality form.
- i. Personnel are to be supervised at all times and are not to wander building. Any Move Vendor personnel found in unauthorized areas must be immediately removed by Move Vendor from laboratory, and cannot return to project.

- j. Personnel are expected to act in professional manner.
- k. No smoking allowed anywhere on premises (neither inside nor outside of buildings).

## **2.5 Documentation and Fee Basis**

The move vendor will provide the owner's Project Manager, or other specified representative, with an itemized list of hours expended at the end of each day.

## **2.6 Compliance with Specifications**

The move vendor will fulfill all of the requirements of this specification document. Any deviation from specifications must be noted on bid response. Deviation from specifications may be grounds for disqualification of the vendor's response.

## **Part III – Owner Responsibilities**

### **3.1 Owner's Project Manager**

The owner will provide a Project Manager who is responsible for the move and will be the primary contact with the move vendor. The Project Manager for Laboratory shall be:

Phone:

Cell:

All questions, communications, etc. regarding this RFQ are to be addressed to the Purchasing Agent. See Section 5.6.

After the award is made, the Move Coordinator will coordinate the work of all parties involved, including the various departments, move vendor, etc. All communications will be through the Laboratory.

### **3.2 Access**

The owner will provide the move vendor with full access to the existing facilities and the new facility for the purpose of move survey and planning. Access will be granted upon request and an owner's representative will accompany the mover. Access to some areas will require training and documentation of access.

## **Part IV – Mandatory Pre-Proposal Conference**

### **4.1 Date, Time, and Location**

A Pre-Proposal Conference will be held on Friday, January 2, 2010 at 2:00 p.m. at the Research Campus Gold Room. Vendors will be given the opportunity to view the current

employee locations and the new locations in Laboratory. Attendance is mandatory. Bids submitted by Vendors who do not attend the Pre-Proposal conference will not be considered.

**4.2 Purpose**

The purpose of the Pre-Proposal Conference is to familiarize Vendors with the present and new move locations, as well as all field and operating conditions that will affect the move.

**Part V – Instructions to Vendors**

**5.1 Deadline**

The response to the RFQ is due no later than 3:00 p.m. CDT on 9 January 2010. Failure by a messenger delivery service or e-mail service to meet the deadline will not excuse the Vendor from the deadline requirement. Only the Purchasing Agent is empowered to whether or not to accept or return late responses.

**5.2 Response Schedule**

<b>Event</b>	<b>Date</b>
• Issue RFQ	27 December 2009
• Pre-Bid Meeting & Walk-Through	2:00 p.m., 2 January 2010
• Question Submission Deadline	4 January 2010
• RFQ Response Submission Deadline	3:00 p.m., 9 January 2010
• Anticipated Contract Award Date	11 January 2010

**5.3 Signatures**

To receive consideration, submitted responses must be signed by an authorized officer or agent of the vendor’s company. Any person, vendor, supplier, corporation or association submitting a response accepts all the terms conditions, and requirements in this Request for Quotation.

**5.4 Response Format**

The laboratory requires electronic submission of the response delivered by the due date and time, to the name and email address listed in 5.6, followed by the submission of two (2) CDs containing the original response to the mailing address listed in Section 5.6. Each response must comply with all specifications as stated in Vendor Qualification Requirements and Vendor Specifications contained in this Request for Quotation. Whenever possible, please have all electronic documents in PDF format.

### **5.5 Questions and Addenda**

Questions related to this RFQ may be sent by e-mail to the Purchasing Agent, no later than 4 May 2007. All questions will be compiled with answers and issued as an addendum to the RFQ and will be made available to all of the prospective Vendors prior to the Quotation due date. Each addendum is incorporated as part of the RFQ documents, and the prospective Vendor must acknowledge receipt.

### **5.6 Primary Contact Information:**

Purchasing questions concerning the information presented in this RFQ must be sent directly to:

Phone: \_\_\_\_\_

E-mail: \_\_\_\_\_

### **5.7 Proposal Requirements**

Proposal Format: Provide PDF format as listed in 2.4.

Duration of Offer

Quotations submitted in response to this solicitation are irrevocable for 60 days following the due date of the responses. This period may be extended by written agreement between Vendor and the Owner.

Proposal Content

Provide the following:

Vendor Question Response

Cost Quotation

## **Part VI - Insurance**

Without limiting any liabilities or any other obligations of the Vendor, Vendor shall provide certificates of insurance documenting the minimum insurance coverage requirements listed below unless otherwise agreed to in writing. Coverage may be by Vendor's self-insurance plan or with outside insurance providers, all subject to Laboratory approval. Such insurance coverage must be maintained until all obligations under the Agreement are satisfied.

- 6.1** Applicable Workers Compensation insurance to cover liability imposed by Federal and State statutes having jurisdiction over Vendor employees engaged in the performance of the Vendor's service. Employer's Liability insurance of no less than \$500,000 each employee and \$500,000 each accident.

- 6.2** Commercial General Liability insurance with a minimum limit of ONE MILLION DOLLARS (\$1,000,000) per occurrence. This policy shall include coverage for bodily injury and property damage, including completed operations, personal injury, coverage for contractual employees, and blanket contractual liability. Policy shall contain a severability of interests provision.
- 5.3** Commercial Automobile Liability insurance with a combined single limit for bodily injury and property damage of not less than ONE MILLION DOLLARS (\$1,000,000) with respect to Vendor's owned, non-owned, hired, or borrowed vehicles, assigned to or used in performance of this agreement.
- 5.4** Umbrella Liability insurance with a minimum limit of \$2,000,000 per occurrence and shall apply to all underlying and primary liability coverages required above.
- 5.5** Professional Services Liability insurance with a minimum limit of ONE MILLION DOLLARS (\$1,000,000) per claim and annual aggregate. This policy shall include coverage for contingent bodily injury liability.
- 5.6** The Commercial General Liability, Commercial Automobile Liability and Umbrella Liability policies required herein shall be endorsed to include the State; Laboratory;, their agents, officials and employees as additional insured.
- 5.7** Vendor and its insurers providing the required coverages shall waive all rights of subrogation or recovery against the Laboratory; State, their agents, officials and employees.
- 5.8** All required insurance policies shall be issued by reputable insurance companies duly authorized to engage in the insurance business in the State, with an A.M. Best's rating of A-, VII or better. These policies shall be primary coverage. Certificates shall specify name of the project and provide that no less than 30 days notice of non-renewal, cancellation or material change shall be given to the Laboratory.
- 5.9** Two (2) Certificates of Insurance showing Vendor's current coverages and limits must be submitted with the Vendor response. Prior to a signed Agreement, Vendor must procure required insurance and provide Laboratory with two (2) Certificates of Insurance. Certificates must reference RFQ # 12697. Vendor's response must include the cost of the required insurance. If current coverage does not meet bid specifications, vendor must upgrade coverage and provide insurance certificate prior to final bid award
- 5.10** Failure on the part of the Vendor to procure or maintain required insurance shall constitute a material breach of contract upon which the University may immediately terminate an Agreement, or, at its discretion, procure or renew such insurance and pay any and all premiums in connection therewith, and all moneys so paid by the University shall be repaid by the Vendor to the University upon demand, or the University may offset the cost of the premiums against any moneys due to Vendor.

**5.11** The Laboratory reserves the right to request and receive certified copies of any or all of the above policies and/or endorsements.

**5.12** The Laboratory reserves the right to waive or reduce the insurance requirements at the Laboratory's sole discretion.

## **Part VII – Award Criteria**

The selection of a move vendor to implement the relocation shall be based primarily on price. However, the following criteria will also be considered:

- a. The demonstrated ability of the contractor to effect a QUALITY move.
- b. Contractor expertise and prior demonstrated experience with moves of similar size and scope.
- c. Permanent personal experience in this type of move and adequate number of experienced personnel to staff this move.
- d. Sufficient number and type of owned or long time-leased equipment required to implement this move.

### **Alternate 1**

There will be some materials in existing refrigerators that will need to be transported quickly to keep the temperatures even. Refrigerated transportation may not be necessary, but quick moves and unpacking is required or alternate of temperature controlled transport provided. List of Refrigerator/Freezer provided in Appendix E. Departmental staff will supervise these moves. Moving in controlled transport will be considered as an alternate.

### **Alternate 2**

Some specialty lab and medical equipment must be disconnected, transported and reconnected by other vendors. A preliminary list of this equipment is listed in Appendix E Specialty Vendor Move. An alternate of moving vendor coordinating all specialty moves is included. A final list will be provided at the time of award.

### **Alternate 3**

Moving of chemical inventory will be considered as an alternate. Moving chemical inventory will require proper packing and handling to ensure safety. Reduction in chemical volume is ongoing. See attachment C for the current maximum quantity chemical list. This list will be updated again after award. See attachment C for the current maximum quantity chemical list.

### **Alternate 4**

Coordination of equipment calibration will be considered as an alternate for weighing balances and Biosafety cabinets that are relocated during this move. Balance calibration must

be conducted by an ISO 17025 certified vendor, certificate provided at time of calibration. Biosafety cabinet certification (all BSC are Class II, no canopy) must be conducted by an **NSF Accredited Class II Biosafety Cabinet Field Certifier and include** the five containment tests for field certifications: downflow velocity profile test; inflow velocity test; airflow smoke patterns; HEPA filter leak test; and a cabinet leak test (when a cabinet is newly installed, relocated, or after panels were removed during maintenance procedures). Copy of certificate to be provided when complete. See list in Attachment F.

**Alternate 5**

Value added capability of packing, set up, pre and post calibration at a very minimal benchmark will be considered as an alternate for some analytical instruments, specifically the gas chromatographs and liquid chromatographs including in Attachment D unless listed as vendor specific move in Appendix E.

**Part VIII– Attachments**

Attachments might include the following: A site map of existing and new facilities; summaries by department of equipment, number of boxes, and furniture to be moved; a supplement on specialty vendor moving; inventories of chemicals and large equipment; lists of equipment requiring calibration; forms for vendor price quotations.







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