



ADMINISTRATIVE COMMUNICATIONS SYSTEM

UNITED STATES DEPARTMENT OF EDUCATION

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Action: Pen and Ink Changes

Title: Moves Within Headquarters Facilities

Number: OM:4-104

Document Changing: OM:4-104, *Moves Within Headquarters Facilities*, dated 04/02/2004.

Summary: This directive establishes the Department policy and procedures for moving individuals and workstations within headquarters facilities.

Pen and Ink Changes: The following pen and ink changes have been made to reflect OCIO's reorganization.

<i>Page</i>	<i>Section</i>	<i>Changed</i>	<i>To</i>
1-9	Date	04/02/2004	09/30/2004
1	Superseding Information	Information described above	Information described above
3	VI. B.	OCIO coordinates move requests with all move components [Installs, Moves, Additions, Changes (IMAC), Telecom, Network Control Center (NCC), Engineering and OM/FS].	OCIO coordinates move requests with all move components [<u>Installs, Moves, Additions, Changes (IMAC), Converged Communication & Network, Network Services Team (NST)</u> , and OM/FS].
4	VI. G.	The OCIO IMAC Project Leader coordinates tasks with all IMAC participants (OM/FS, NCC, IMAC Team, Tier 2, Telecom, Engineering, and Cabling) associated with any Department move.	The OCIO IMAC Project Leader coordinates tasks with all IMAC participants (OM/FS, NST, <u>IMAC Team</u> , Tier 2, Converged Communications & Network, Engineering, and End User Support) associated with any Department move.



ADMINISTRATIVE
COMMUNICATIONS SYSTEM
U.S. DEPARTMENT OF EDUCATION

DEPARTMENTAL DIRECTIVE

OM:4-104

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Distribution:
All Department of Education Employees

Approved by: _____ /s/ (04/02/2004)
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Moves Within Headquarters Facilities

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For technical questions regarding this ACS document, please contact Robert Lacey via [e-mail](#) or on 202-401-1446.

Supersedes OM:4-104 "Moves Within Headquarters Facilities" dated 04/02/2004.

I. Purpose

This directive establishes the U.S. Department of Education's (Department) policy and procedures for moving individuals and workstations within headquarters facilities.

II. Policy

The Office of Management's/ Facilities Services (OM/FS) moves only government-owned program materials, organizational furniture, and office equipment. The Office of the Chief Information Officer (OCIO) moves the Department's accountable information technology (IT) and telecommunications (Telecom) equipment. OM/FS moves workstations when, in OM/FS's judgment, there is insufficient or inappropriate furniture at the new location. OM/FS does not move employee-owned property. OM/FS will minimize the disruption to the office being moved. All forms referenced throughout this directive can be accessed on ConnectED under Forms/Move.

III. Authorization

Federal Property Management Regulations, 41 CFR, Chapter 101.

IV. Applicability

This directive applies to all moves within the Department's headquarters facilities.

V. Definitions

- A. **Chargebacks.** Funding provided by the Principal Office (PO) out of the PO's Salaries and Expenses allocation to pay for Departmental administrative services, supplies, or equipment that is not already funded or provided for in the current OM budget. This includes 1) offices that provide such funding through their separately appropriated accounts and 2) offices that are funded from the same appropriation as OM (Program Administration funds).
- B. **IT and Telecom Equipment.** Any equipment or interconnected system or subsystems of equipment used in the automatic acquisition, storage, manipulation, management, movement, control, display, switching interchange, transmission or reception of data or information. This includes desktop personal computers and related peripheral components.
- C. **Excess Property.** Property no longer needed by an office.
- D. **Office Equipment.** Includes typewriters, calculators, paper shredders, fax machines, or any other office machinery, excluding IT and Telecom equipment.
- E. **Organizational Furniture.** Items shared by the organization such as file cabinets,

storage cabinets, worktables, bookcases, etc.

- F. **Program Material.** Generally consists of files, records, publications, brochures, etc.
- G. **Systems Furniture.** Connected structural panels with a wide range of furniture components, panel supported and/or freestanding work surfaces, and drawer pedestals.
- H. **Workstations.** Generally consists of a desk and chairs and may include other furniture or equipment assigned to individual employees.

VI. Responsibilities

- A. **Executive Officers (EXOs)** (1) involve OM's Labor Relations Team and/or the Union in appropriate aspects of planning for moves of bargaining unit employees in accordance with appropriate agreements and (2) request space or moving services by calling OM/FS' Customer Service Center (CSC) and complete the appropriate forms as indicated in the [Move Procedures](#) section of this directive. EXOs must sign the final floor plans and the PO may not deviate from the signed plan without the EXO's written concurrence.
- B. **OCIO** coordinates move requests with all move components [[Installs, Moves, Additions, Changes \(IMAC\)](#), Converged Communication & Network, Network Services Team (NST), and OM/FS]. OCIO plans, schedules, and establishes customer IT and Telecom equipment requirements. In addition, OCIO is responsible for tracking customer IT equipment and Telecom equipment changes in the Help Expert Automation Tool (HEAT).
- C. **OM's Labor Relations Team** works with EXOs and OM/FS to involve the Union in appropriate aspects of planning for moves of bargaining unit employees in accordance with appropriate agreements. After completion of collective bargaining obligations, OM's Labor Relations Team informs the EXO and/or OM/FS.
- D. An **EXO Move Coordinator/Asset Manager** is designated by the EXO to coordinate all aspects of moving IT and Telecom equipment. The EXO Move Coordinator/Asset Manager is authorized to request moves on behalf of the respective Executive Office. The EXO Move Coordinator/Asset Manager also ensures the Asset Management System is updated after each move has been completed.
- E. **OM/FS** surveys space for planned moves, obtains any required General Services Administration (GSA) approval for structural changes and provides technical assistance to POs in the areas of space planning and office layouts.
- F. **OM/FS' Move Coordinator** coordinates with the EXO Move Coordinator/Asset Manager and the Department's contract movers to schedule and execute moves.
- G. The **OCIO IMAC Project Leader** coordinates tasks with all IMAC participants (OM/FS, NST, [IMAC Team](#), Tier 2, Converged Communications & Network,

Engineering, and End User Support) associated with any Department move.

- H. **OM's Management Service's (MS) Copier Specialist** determines who moves the copiers and makes necessary arrangements to have copiers moved.
- I. **The Department's Move Contracting Office Representative (COR)** is responsible for monitoring the Department's contractor movers to ensure that their work stays within the scope of the contract and move all packed workstations, equipment, program materials, and any other items as directed.
- J. **CSC**, under direction of OM/FS, processes appropriate forms as indicated in the [Move Procedures](#) section of this directive and forwards them to the appropriate office(s).
- K. **Employees** prepare and pack workstations, organizational equipment, and program materials to be moved using instructions and forms as indicated in the [Move Procedures](#) section of this directive. Employees notify the EXO Move Coordinator/Asset Manager of any problems encountered during the moving process.

VII. Chargebacks

OM/FS will notify the EXOs prior to incurring excessive costs to avoid chargebacks. The PO is responsible for reimbursing OM/FS for excess costs due to the following situations:

- A. Incurring unnecessary delays when the procedures in this directive are not followed (i.e., failure to follow customer guidelines).
 - 1. Making changes after the final plan has been signed by the EXO.
 - 2. Not choosing the most cost-effective move/alteration plan (PO will pay the difference).
 - 3. Not notifying OM/FS within the directed time frames that a move is planned.
- B. More than one major move during a fiscal year consisting of 20 percent or more of the PO.
- C. More than two small moves during a fiscal year consisting of less than 20 percent of the PO.

OCIO has a chargeback system in place for certain expenses that may be incurred in a move. They include, but are not limited to, the following:

- A. Cabling needed to support the move.
- B. The movement of IT and Telecom equipment after normal working hours.

- C. Network infrastructure materials if the move is to a space that was not previously occupied by the Department.

VIII. Move Procedures

A. Space Planning

1. In accordance with the [Space Management directive](#), when EXOs plan a move, they involve OM/FS space planning personnel. EXOs will provide program requirement data when necessary so that OM/FS space planning personnel can provide assistance in strategic planning to ensure a cost effective and time efficient approach to implementation prior to submitting the request for move. EXOs will then submit a request for space planning to the OM/FS staff.
2. When OM/FS receives a request for space planning, the OM/FS staff:
 - a. Schedule a Kick-Off Meeting within one week of receiving the request to assess current and projected needs. In attendance may be the EXO Move Coordinator/Asset Manager, the OM/FS Move Coordinator, OCIO, the OM/MS Copier Specialist, and the Department's Move COR;
 - b. Agree on a schedule with the PO;
 - c. Survey the space to determine what is required for occupancy;
 - d. Design and develop floor plans;
 - e. Obtain GSA approval for structural changes (i.e., removing or constructing walls);
 - f. Arrange for the service(s) to be completed and ensure that space is ready for occupancy; and
 - g. Notify the EXO when the space is ready for occupancy.
3. After the EXO obtains the appropriate in house clearances and approval, the EXO will sign the final floor plan. The PO may not deviate from the signed plan without the EXO's written concurrence.

B. Requesting Moving Services

1. Upon approval, EXOs:
 - a. Contact the Labor Relations Team for possible notification to the Union.
 - b. Coordinate moving services with OCIO to request moving instructions for IT and Telecom equipment. OCIO procedures and forms are available on

the OCIO/Enterprise Lifecycle Management Support Team (ELMst) website at http://connected.ed.gov/doc_img/move_proc.doc.

- c. Submit a completed form requesting moving services to the CSC for processing at least:
 - (i) **10 working days before** a move that involves 10 or fewer workstations;
 - (ii) **At least 30 working days before** a move involving 11 or more workstations; or
 - (iii) The information found in the table shown below gives the lead-time OCIO needs to move IT and Telecom equipment.

Telephone and PC Moves		
Move Types	PCs 5 or less / Telephone moves 10 or less	PCs greater than 5 and Telephones greater than 10
<i>Internal Moves</i>	PCs 5 days Telephones 10 days	PCs 5 days Telephones 10 days
<i>External Moves</i>	PCs 10 days Telephones 10 days	PCs 10 days Telephones 45 days
<i>Special Moves (moves to new space)</i>	PCs 35 days Telephones 60 days	PCs 35 days Telephones 60 days
<i>Temporary/ Emergency moves</i>	As much notice as possible	As much notice as possible

- 2. The CSC records the request, enters the information into the internal database, assigns an internal number, and forwards it to OM/FS and OCIO.
- 3. Once the move date has been established with all necessary signatures, the OM/FS Move Coordinator and the EXO Move Coordinator/Asset Manager will conduct a physical inventory to establish what items will be moved and what items to surplus. The OM/FS Move Coordinator will excess all surplus items after the PO has been relocated.
- 4. OM/FS's Move Coordinator:
 - a. Contacts the EXO Move Coordinator/Asset Manager and the OCIO IMAC Project Leader within one day to initiate move coordination;
 - b. Schedules moving date(s) and time(s);
 - c. Forwards moving instructions to the EXO Move Coordinator/Asset Manager for distribution to the appropriate employees; and

- d. Makes arrangements to deliver packing boxes.
5. The EXO Move Coordinator/Asset Manager:
 - a. Informs employees to be moved of the scheduled moving date(s) and time(s);
 - b. Provides moving instructions;
 - c. Ensures that packing boxes, tape, and labels are available; and
 - d. Collects corridor keys and returns them to the OM/FS Move Coordinator.
 6. Employees use the instructions provided by the EXO Move Coordinator/Asset Manager. In addition to several other items, these instructions indicate how to:
 - a. Label items to be moved with employee name, building, and room number;
 - b. Empty and pack desk drawers, filing and storage cabinets;
 - c. Move employee-owned property;
 - d. Notify the EXO Move Coordinator/Asset Manager promptly of any problems encountered during the move process; and
 - e. Submit corridor door keys to the EXO Move Coordinator/Asset Manager.

C. Executing Move

OM/FS's Move Coordinator:

1. Notifies OM's Security Services personnel and the GSA Building Manager of the date(s) and time(s) of the scheduled move and makes arrangements for dock access, security, and elevator service; and
2. Authorizes contract movers to execute the move on the date(s) and time(s) scheduled.

D. Disconnect Workstations

1. The Department's Move Contractors will label all IT and Telecom equipment with removable labels for all computer equipment (CPUs, monitors, printers and peripherals), which will include the customer's name, building, and new location room number.

2. OCIO technical staff will disconnect computers at the old location (CPUs, monitors, local and network printers, and other peripherals).
3. For each user, the OCIO technical staff will pack all small peripherals into 14" x 25" plastic bags provided by OM and place a label on the bags. (This includes Government-owned keyboards, mouse, speakers, zip drives, PDA, assistive technology equipment.)
4. OM Move Contractors will pack/move computers at the old location to the new location (CPU, monitors, local and network printers, and other peripherals in the plastic bags).
5. Complete workstations and the user's labeled plastic bags will be moved so that the OCIO technical staff can begin reconnections immediately following the move of a workstation.

E. New Location

OCIO will post customer identification sheets that includes the customer's name, building and office/cubicle room number at each user's new location. The customer identification sheet was created to assist the movers and IT and Telecom equipment staff.

F. Reconnect Workstations at New Location

1. OM Contractors will unpack computers at new location (CPUs, monitors, local and network printers, and other peripherals in plastic bags).
2. OCIO technical staff will reconnect computers at new location (CPUs, monitors, local and network printers and other peripherals) and ensure EDNet connectivity of all IT and Telecom equipment; and test for printing capabilities.
3. OCIO technical staff will provide post-move follow-up when the users return to the office the next business day.

G. Furniture and Copiers Requiring Special Handling

1. **Systems Furniture.** If systems furniture is relocated, OM/FS will coordinate with the furniture contractor on the development of layout plans and will ensure that the contractor will disassemble furniture at the current location and reassemble it at the new location.
2. **Leased Copiers.** The Department can move some low-volume copiers. Mid to high-volume copiers must be moved by the vendor. When a large move requires relocation of copiers, OM/FS will notify the OM/MS copier specialist as part of the move planning. To only move a copier, use the steps below.
 - a. To move leased copiers, EXOs will call the CSC with the name, type, and

model of copier machine at least 30 days prior to the proposed move date.

- b. CSC will forward the information to the OM/FS Move Coordinator and the OM/MS Copier Specialist.
- c. After receipt of the notification, the OM/MS Copier Specialist:
 - (i) Arranges to complete any special electrical requirements at least two weeks prior to the proposed move; and
 - (ii) Schedules the moving of leased copiers according to the manufacturer's instructions.