

# Guidelines for Planning a Records Move

The three most important things when moving offices is "planning, planning, planning." Often little thought goes into moving the office records. To plan and implement a successful move of office records, (1) determine what needs to be moved, (2) decide what to do with what should not be moved, and (3) consider the effective use of space and equipment in the new office.

## Short Checklist

>The key to a successful move is moving only those records that need to be moved<

- Assign a lead person to organize and oversee the records for moving.
- Devise a timetable. Who does what when?
- Go to <http://www.archatl.com/offices/archives/recmgmt.html> to download the Archdiocese's Records Policy, Archdiocesan Records Retention Schedule, Definition of Records, Chancery Records to Save Forever, Guidelines for Packing Records, Guidelines for Weeding Records, Box List Form, Transmittal Form, and the Application for Authority to Dispose of Records, which is required by the Chancellor.
- Identify records. Sort the records by status – active, inactive, and archival.
- Purge outdated, useless materials using the Records Retention Schedule.
- **Obtain permission from the Chancellor to destroy records, because records are owned by the Archdiocese, not by employees, even though you created them.**
- Retire important semi-active records to off-site storage - call the Archives for information.
- Send permanent records to the Archives - call the Archives for information.
- Plan placement of equipment and records in the new space. Consider any special records requirements, such as reinforced floors, for certain types of filing equipment.
- Records in the bottom two drawers of file cabinets can be moved in the cabinets.

## Move Planning

- **Reduce the volume of records** prior to the move so (1) that there is less to move and, (2) that the new space will be used effectively. Organize a "Clean-Up Campaign."
- Records with addresses, bank account numbers, and social security numbers need to be shredded. Contact the Archives about the number of boxes to be destroyed.
- **I-Shred shredding service will be available when needed.** Call the Archives.
- Most inactive records can be thrown out! Large bins are available on each floor of the building to make it convenient to dump the paper, once permission is obtained.
- An oversized boxcar bin is also located outside near the Facilities Office for large materials, broken furniture, old Christmas trees and the usual junk hidden in closets, etc.
- For records that are to be retired to the Archives, usually after three years in the office, contact the Archives for transfer instructions. **Your office is not the Archives.**
- Records that go into off-site storage ALWAYS have a destruction date. Prepare records for boxing by separating according to record group and according to similar destruction date. See Guidelines for Packing on the Archives webpage. The Archives will arrange for the transfer to off-site.
- Dump the rest! Be ruthless! Get rid of paper! Call the Office of Archives and Records at **404-978-0796** for help in coordinating your clean-up and for emotional support!
- Plan what records will be housed in central filing areas at the new location and what will be filed in work stations. Plans will need to include the allocation of central filing space, so that as records are moved to the new offices, the boxes can be assigned to and placed in the appropriate shelving areas and work spaces. Details will be forthcoming.
- Name records according to existing retention schedules and record the volume of each record group to create an inventory of records to be used on move day.
- **Start now.** Don't take trash to the new building!

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