Comprehensive Relocation Assistance

May 11, 2010
A. GENERAL INFORMATION

Request for Proposal (RFP) Name: Comprehensive Relocation Assistance

RFP Number: #CK051110

Issue Date: May 11, 2010

Brief Description
The University seeks one or more experienced firms to provide relocation services as requested by current and former employees of the University of Virginia. Services will include both departure services and destination services.

Preproposal Questions: Any questions concerning this RFP must be sent to the buyer listed below no later than 3:00 p.m. on Monday, May 17, 2010 in order to guarantee a timely response prior to the proposal due date.

Proposal Due Date: 3:00 p.m. Thursday, May 27, 2010. Proposals must be sent via email using the contact information in the box below. The University of Virginia (the “University”) reserves the right to reject proposals received after the stated due date and time.

Negotiations: Negotiations, if needed, will be held on Monday, June 7, 2010

Expected Award Date: June 21, 2010

Term of Agreement: The term of a resulting Agreement or Purchase Order will be for five years, with the ability to renew on the same terms and conditions, for two additional one-year periods if mutually agreeable to the University and the Selected Firm. The Selected Firm and the University will mutually agree at least 180 days prior to each renewal period whether to renew the terms of the Agreement.

REFER ALL QUESTIONS TO THE ISSUING OFFICE:

UNIVERSITY OF VIRGINIA
Department of Procurement Services
1001 North Emmet St, Carruthers Hall
P.O. Box 40020
Charlottesville, VA 22904-4202
Attention: Charles Kidd
Phone: 434-924-3507
Fax: 434-982-2690
Email: ck5b@virginia.edu

NOTE 1: The University does not take responsibility for lost or misdirected mail.
NOTE 2: During the RFP process, all communication must be directed to the buyer listed above, with the exception of issues directly related to SWAM business and SWAM subcontracting opportunities. Such SWAM issues may be alternately directed to Bill Cooper, the University's Director of Supplier Diversity, at (434) 924-7174 or SWAM@virginia.edu. Any failure to adhere to this requirement may result in the rejection of the firm’s proposal or cancellation of the RFP.
This Request for Proposal (RFP) has been posted on Procurement Services web site for your convenience. Addenda and attachments are posted if issued. The RFP can be downloaded at this web site: 
http://www.procurement.virginia.edu/pagerfp. It is the firm’s responsibility to ensure that the latest version of the entire RFP and related links are reviewed prior to submission of a proposal. We encourage you to check the web site frequently for any changes prior to the due date. Call (434) 924-1346 if you have trouble accessing the RFP from the web. For questions about the content of the RFP, contact the buyer listed above. Additional information can be found on Procurement Services web site:  
http://www.procurement.virginia.edu

For ease of reference, each firm or individual receiving this RFP is referred to as a “firm” and the firm or individual selected to provide services for the University is referred to as the “Selected Firm.” This RFP states the instructions for submitting proposals and the procedure and criteria by which a firm may be selected.

B. SCOPE OF GOODS & SERVICES

The University seeks experienced firm(s) to provide comprehensive relocation assistance (“Services”) related to the departure and destination for its current and former faculty and staff members. As the representative of current, former, and new employees in a stressful and busy timeframe, the University wants to insure (Should be ensure?) a good impression, exceptional service and a good value. These Services will be international, throughout the United States, and within the State of Virginia. The Selected Firm(s) will, as requested, provide assistance in developing and maintaining a website for Moving and Relocation Services/Assistance.

The Selected Firm(s) will provide a single point of contact for the University and each current and former University faculty or staff member in the areas of comprehensive relocation assistance. The Selected Firm(s) will provide the following services at no additional cost to the University employee. The services include but are not be limited to:

1. Household Moves
   a. Provide trained and certified relocation professionals.
   b. Coordinate international, intrastate, interstate, and local transportation of household goods through one of the University’s contracted moving firms.
   c. Obtain quotes from the University’s contracted moving firms, and coordinate the quote(s) with the employee and appropriate University department.

2. Departure Services.
   Provide a qualified Real Estate Agent in the origin area as requested by the University employee. This professional will assist in the sale of the residence by providing comprehensive marketing assistance, including development of a marketing/sales plan for the current house, banking services, and closing services.

3. Destination Services
   a. Provide a qualified Real Estate Agent to work one on one with employees and their families to analyze their housing preferences with respect to purchase or rental of the residence. The Selected Firm(s) will:
      • In the event of rental or short term lease of a residence provide assistance to include rental contract or short term lease options.
In the event of a home purchase, provide assistance with mortgage by identifying and securing the best loan products, terms contract, banking services, and closing services.

b. Provide customized orientation to the new community through area tours, brochures, and demographic information, as requested by the employee or the University Human Resources Department. The area tour should include as a minimum:
   - Schools, churches, shopping, entertainment and medical facilities.

c. Provide information on local taxes.

d. Provide assistance and referrals for Family Transition, Spouse/Partner Career Transition, Child and elderly care, and Mortgage Counseling services as requested.

e. Provide assistance on smaller moves to include but not limited to (PODS) and self moving vans.

C. BASIS OF SELECTION

Proposals will be evaluated based upon the overall merits/value of the proposal. The University will evaluate proposals, and if a firm is to be selected, select the firm on the basis of:

1. The firm's plan to provide the University with the products as described in the Scope of Good and Services section;
2. The firm’s experience in providing Goods and Services similar to those described in this RFP, to include the firm’s references from clients;
3. The firm’s proposal; including any pricing and rebates
4. The firm’s Small, Woman-owned and Minority-owned (SWAM) businesses status and/or the firm’s plan for utilization of SWAM businesses. For more information about SWAM and the University’s SWAM plan, please see the letter at Attachment 1 and refer to the following site: www.procurement.virginia.edu/main/publicpostings/rlp/SWAMplan.pdf

   Note 1: A 10% minimum weight will be given to this criterion in evaluating proposals.
   Note 2: Any questions related to SWAM business and SWAM subcontracting opportunities can be directed to Bill Cooper, the University’s Director of Supplier Diversity, at (434) 924-7174 or SWAM@virginia.edu.

D. CONTENTS OF PROPOSAL

Proposals will be prepared simply and economically, providing a straightforward, concise description of capabilities to satisfy the requirements of the RFP. Emphasis will be on completeness and clarity of content, and will be organized in the order in which the requirements are presented in the RFP.

Unnecessarily elaborate brochures and other presentations beyond that sufficient to present a complete and effective proposal are not desired and may be construed as an indication of the firms’ lack of cost consciousness. Elaborate artwork, expensive paper and bindings, and expensive visual and other presentation aids are neither necessary nor desired.

Firms will provide the following information:

1. A brief history of the firm and its experience, qualifications and success in providing the type of product requested.
2. A detailed description of the Services proposed. Each firm will indicate in their proposal the firm’s ability to achieve / comply with the objectives set forth in Section III, Scope of Goods and Services. Include a listing of all steps of service, from initial request through invoicing. In the event that the firm wishes to propose an alternate service that, in any way, differs from the above objectives, the firm will detail their proposed change(s) and how the proposed change would compare to the listed objectives. Proposals will be formatted in such a way to address each of the above objectives in a line-by-line process.

3. The firm’s proposed price / fee/ rebates for providing the Services.

4. At least three references where similar services have been provided. Include the name of the firm / organization, the complete mailing address, and the name of the contact person and their telephone number.

5. Describe the firm's plan for customer service, including, but not limited to:
   a. Capability of analyzing relocation request and making recommendations
   b. Effective procedures for complaint resolution and problem escalation
   c. Flexible procedures for the placement of orders
   d. Emergency service to include weekends and holiday

6. Resumes of the customer service representative(s) who will be directly responsible for the University’s Account.

7. The firm’s Small, Woman-owned and Minority-owned (SWAM) businesses status and/or how the firm intends to utilize SWAM firms in regards to this particular procurement.

8. Provide a list of institutions of higher education with which the firm has relationships.

9. Provide the amount of annual sales the firm has with each VASCUPP Member Institution. A list of the VASCUPP Members can be found at http://www.vcu.edu/procurement/coopcon.htm

10. Complete and return the information requested in Attachment 2, Firm Information.

NOTE: Virginia Freedom of Information Act
Except as provided below, once an award is announced, all proposals submitted in response to this RFP will be open to the inspection of any citizen, or any interested person, firm or corporation, in accordance with the Virginia Freedom of Information Act. Trade secrets or proprietary information submitted by a firm as part of its proposal will not be subject to public disclosure under the Virginia Freedom of Information Act; however, the firm must invoke the protections of this section prior to or upon submission of its proposal, and must identify the specific data or other materials to be protected and state the reasons why protection is necessary. A firm may not request that its entire proposal be treated as a trade secret or proprietary information. Nor may a firm request that its pricing be treated as a trade secret or proprietary information, or otherwise be deemed confidential.

E. TERMS AND CONDITIONS

This solicitation and any subsequent award is subject to:

- The Selected Firm registering as a vendor with the University of Virginia. [https://www.procurement.virginia.edu/pagevendorregistrationform]

- Unless otherwise deemed appropriate by the University, the Selected Firm(s) will enroll in one of the University approved methods for receipt of electronic payments. Accordingly, the Selected Firm agrees to accept Bank of America’s (“BoA”) ePayables® method of electronic payment or BoA’s PayMode® method of electronic payment.
• The Selected Firm registering and accepting eVA Terms and Conditions prior to award.  
  [http://www.eva.virginia.gov/]

• The University’s Mandatory Contractual Provisions:  

• The University’s Preferred Contractual Provisions:  

**Note:** Unless a firm *expressly and specifically states its exception* to any of the Preferred Provisions in its written proposal, then the proposal from the firm will automatically be deemed to include those Provisions.

• The University's Procedure for Resolution of Contractual Claims  

### F. OTHER INFORMATION

1. **Insurance**  
   Listed below is the insurance the Selected Firm must maintain under any Agreement resulting from this RFP. In no event should the Selected Firm construe these minimum required limits to be their limit of liability to the University. The Selected Firm will maintain insurance which meets or exceeds the requirements of the University with insurance companies that hold at least an A- financial rating with A.M. Best Company. No Agreement will be executed by the University until the Selected Firm satisfies the insurance requirements of the University. The Selected Firm may be required to provide the University with a valid Certificate of Insurance before providing any goods or services to the University. The University reserves the right to approve any insurance proposed by the Selected Firm.

   **Comprehensive Commercial General Liability:**  
   The Selected Firm and any Subcontractor will maintain a minimum combined single Limit of Liability for bodily injury and property damage of $750,000 per occurrence, with coverage for: premises/operations and products/completed operations.

   **Automobile Insurance:**  
   The Selected Firm and any Subcontractor will provide a minimum combined single Limit of Liability for bodily injury and property damage of $750,000 per accident, with coverage for: owned, hired, and non-owned automobiles operated by their employees.

   *Additional Insured:*  
   The University will be named as an Additional Insured, and the proper name is: "The Commonwealth of Virginia, and the Rector and Visitors of the University of Virginia, its officers, employees, and agents."

2. **Formation of the Agreement with the Selected Firm**  
   All proposals received will first be carefully evaluated by the University, and then the University intends to conduct negotiations with two or more firms. After negotiations have been conducted, if the University chooses to make award, the University will select the firm which, in its opinion, best meets the needs of the University. Alternately, if the University determines in writing and in
its sole discretion that only one firm is fully qualified, or that one firm is clearly more highly qualified than the others under consideration, it may decide to negotiate and award an agreement to that single firm. In either event, the University intends to execute a mutually satisfactory written agreement which will reflect and largely incorporate this RFP as reconciled with any pertinent documents, such as the proposal submitted and relevant negotiation correspondence.

**Because the University may choose to negotiate and award to a single firm as discussed above, each firm must include in its written proposal all requirements, terms or conditions it may have, and should not assume that an opportunity will exist to add such matters after the proposal is submitted.**

Any firm(s) invited to negotiations should note that the University reserves the right to begin negotiations by combining the best aspects of submitted proposals from all responding firms as the basis for subsequent formation of any Agreement resulting from this RFP.

Firms should also note that, as described in Section H, Provisions Deemed Included in the Proposal, certain matters will automatically be deemed part of the proposal.
Greetings:

The quality of service the University of Virginia is able to deliver to its customers is directly related to the excellent support we receive from you and many other outstanding suppliers of goods and services. Without you, we would not be able to fulfill our educational, health care and research missions. An important part of our procurement program involves our commitment to doing business with small, women-and minority-owned (SWAM) businesses. As one of our most important vendors, we look to you to help us achieve this objective.

We conduct substantial business with small firms. We have been less effective in securing long-term business relationships with minority-and women-owned businesses. We are determined to improve our record.

I seek your assistance in two areas. First, to the extent practical, I ask that you involve small, women-and minority-owned businesses in the delivery of services you provide to UVa. Second, I seek your help in reporting your results through our quarterly subcontracting reports. The terms and conditions previously provided to your organization outlined this process.

This effort is important to us. We depend on you in so many ways – this is another way that we can partner with your company to make things better.

Sincerely,

Leonard W. Sandridge
Executive Vice President and Chief Operating Officer

LWS:dr
Full Legal Name *(Company name as it appears with your Federal Taxpayer Number)*:

Address:

Telephone Number:         FAX Number:
Web Address:
Email Address:

DUNS Number:

**SWAM Information:**
Is your firm certified with the Commonwealth of Virginia’s Department of Minority Business Enterprises (DMBE): □ Yes □ No

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<thead>
<tr>
<th>Minority-Owned Business:</th>
<th>□ Yes □ No</th>
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<tbody>
<tr>
<td>Women-Owned Business:</td>
<td>□ Yes □ No</td>
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<tr>
<td>Small-Owned Business:</td>
<td>□ Yes □ No</td>
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Is your firm registered as a vendor in the Commonwealth of Virginia’s e-procurement system (eVA)? □ Yes □ No

**Point of Contact for this Proposal:**
Name:
Address:

Office No.         Mobile No.         FAX No.
Email Address: