Request for Proposal

Relocation Services

November 9, 2009

A VASCUPP Member Institution
Issued by
Procurement Services
Charlottesville, Virginia
A. GENERAL INFORMATION

Request for Proposal (RFP) Name: Relocation Services

RFP Number: #CK110909

Issue Date: November 9, 2009

Brief Description: The University seeks one or more experienced firms to provide relocation services for household goods, automobiles, storage, and real estate assistance as requested by new employees of the University of Virginia (“University”).

Preproposal Conference: An optional Preproposal Conference will be held on Tuesday, November 17, 2009 @ 10:00 a.m. EST at Carruthers Hall Conference Room E Charlottesville, Virginia (map may be viewed at this web site: http://www.virginia.edu/Map/). The purpose of the Preproposal Conference is to allow potential interested parties an opportunity to present questions and obtain clarification relative to any facet of this RFP. While attendance at this conference will not be a prerequisite to submitting a proposal, interested parties who intend to submit a proposal are strongly encouraged to attend. Bring a copy of this RFP with you.

Firms planning to attend the Preproposal Conference should notify Rebecca Sims either by email (pur-rfp@virginia.edu), no later than Thursday, November 12, 2009 @ 10:00 a.m. EST of the names, titles, and phone numbers of the individuals who will attend.

Proposal Due Date: Wednesday, December 2, 2009 @ 10:00 a.m. EST. Three copies of each proposal may be sent via mail using the contact information in the box below. The University reserves the right to reject proposals received after the stated due date and time.

Negotiations: Negotiations, if needed, will be held on Tuesday, December 15, 2009.

Expected Award Date: January 29, 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.
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 relocation services for its newly hired faculty and staff members. As the first “face” of the University that new faculty and staff see, we want to insure a good impression, exceptional service and a good value. These moves will be international, throughout the United States, and within the State of Virginia.

The Successful Firm(s) will provide all labor and referrals, including supervision, tools, equipment, licenses and incidentals required and/or implied for the complete and satisfactory performance of services at the required locations. In order to achieve this goal, the Selected Firm(s) may be requested to provide those goods and services outlined in this section:

1. Provide a single point of contact for the University and each new University faculty or staff member.
2. Provide international, intrastate, interstate, and local transportation of household goods for employees of the University.
3. Provide information to the employee of the University about packing, moving and unpacking of household goods, and discarding of all debris at destination.
4. Provide an estimate to the employee prior to final move arrangements. The estimate will be based on actual review of the origin and destination and include all know costs including storage. Final cost will not exceed 10% over the estimate except in instances of hidden costs.

5. Provide or assist in arranging supplemental services relating to the movement of household goods such as auto transport, pet transport, storage, etc.

6. Will train and certify all individual moving professionals employed by the Selected Firm(s). The professionals will be uniformed, clean, sober, helpful and friendly.

7. Provide the University employee all services as outlined in the Selected Firm(s)’s estimate and accepted by the employee, including but not limited to: packing, moving and unpacking of household goods, and discarding of all debris at destination.

8. Detail an effective and comprehensive quality program, including how all members are trained, where the training is conducted and any certifications that are required.

9. Provide a detailed communication process to be utilized throughout the household goods move. This will include shipment tracking capabilities and technological tools used.

10. Outline its claims handling procedure, including the communications that will take place throughout the process and the escalation method if problems occur that cannot be resolved.

11. Provide Real Estate assistance as needed.
   a. Refer the University employee to a qualified Real Estate Agent in the origin area. 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. The Selected Firm(s) will provide the Real Estate Services with no additional cost to the University employee.
   b. Refer the University employee to a qualified Real Estate Agent in the destination area. The Real Estate Agent will provide an area orientation tour prior to the relocation. This person will show the community in depth and provide destination area information (schools, weather, taxes, banks, etc). This professional will assist in the purchase, rental, and or short term lease of a residence by providing comprehensive marketing assistance, including rental contract offer, short term lease options, contract offer for a perspective house, banking services, and closing services. The Selected Firm(s) goal is to assist in purchasing or renting the home quickly, and for the best price possible. The Selected Firm(s) will provide the Real Estate Services with no additional cost to the University employee.

12. Provide family transition, spouse/partner career transition, child and elderly care, and mortgage counseling services as requested.

13. Assist with smaller moves including but not limited to (PODS) and self moving vans.

14. Possess a green/sustainability program whereby boxes and other moving supplies are provided for reused or are removed by the Selected Firm and not put in Charlottesville area landfills.

C. BASIS OF SELECTION

Proposals will be evaluated based upon the overall merits/value of the proposal including, but not limited to, price. 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 price proposal; and
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/rfp/SWAMplan.pdf

Notes: A 10% minimum weight will be given to this criterion in evaluating proposals. 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.

Firm will provide the following information:
1. Operations
   a. Describe how the firm plans to provide relocation services to the University. Include a description of how the firm will work with the University to provide this service.
   b. Provide a plan of operation to achieve 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.
   c. Describe the firm's plan for customer service, including, but not limited to:
      • Capability of analyzing relocation request and making recommendations
      • Effective procedures for complaint resolution and problem escalation.
      • Flexible procedures for the placement of orders
      • Emergency service to include weekends and holiday

2. Firm(s) Information, Personnel, References
   Describe the national firm and the designated local agency, its size, number of employees, and annual sales. This should include:
   a. National Firm
      • A brief history of the National Firm, emphasizing its services to higher education and/or to major corporate accounts;
      • An organizational chart indicating which individuals or positions will have knowledge of an Agreement with the University, and the degree to which each person will be responsible to the University’s account;
      • A copy of the Firm’s Interstate Commerce Commission (ICC) certificate describing the National Firm’s scope of authority;
      • A copy of the National Firm’s current tariff and supplements;
      • A description of the National Firm’s road equipment dispatch system;
      • A description or examples of the National Firm’s and local agent(s)’s driver training and safety programs. Include copies of any services awards, if applicable;
b. Local Agents

- The number of employees, annual sales, quantity of road equipment, and location of the local agency designated for the University’s account;
- The name and a brief history of the Firm’s local agency;
- An organizational chart of the Firm’s local agency indicating which individuals or positions would have knowledge of an Agreement with the University, and the degree to which each person would be responsible to the University’s account;
- A list of local agents which have warehouse facilities;
- Resumes of the customer service representative who will be directly responsible for the University’s Account;
- A detailed description of the local agent(s)’s present pack and load percentage with three references that can verify this;
- A description of the warehouse facilities of the designated local agent(s);
- A description of the local agent(s) commitment to the University in terms of resources, personnel, investment, etc.; and
- A copy of the local agent(s)’s most recent financial statements.

- Describe the local agent(s)’s general experience in providing services of the nature the University seeks.

c. Provide a list of all of the firm's clients comparable to the University indicating the length of service of each account. Please provide contact names, email address, phone numbers and year 2009 shipment totals tendered to the local agent(s) by these references.

d. Provide three clients lost within the last three years which includes:

- A contact name and telephone number
- Length of service at the account
- Reason for the loss

3. Financial Proposal

Describe the firm’s financial proposal including, but not limited to, fees for:

1. Packing/Loading services, including small and larger clients
2. Unpacking/Unloading services
3. Appliance servicing (disconnect, preparation for transport, and reconnect)
4. Extra pickup and deliveries
5. Short term storage in the event new housing is not immediately available
6. Transportation services including surcharges
7. Tariff Rates
8. Insurance rates
9. Real Estate services
10. Any other relevant fees

4. Provide a sample move proposal to the following:
   a. Based on the rates and discounts indicated in response to this RFP, prepare a sample bill of lading indicating the charges as they would appear for each of these four household moves: from Raleigh, NC (27612) to Charlottesville, Va. (22904); from Seattle, WA (98101) to Charlottesville, Va. (22904); from Chicago, IL* (60605) to Charlottesville, Va. (22911); and from River Falls, WI (54022) to Charlottesville, Va.(22911).
   b. Assume 9,000 pounds as well as any origin and destination additional transportation charges that would apply. A grand piano and a riding mower will be moved for each move. There will be washer/dryer service at both origin and destination, $75,000 full replacement value protection requested by the employee. If there would be no charge for a particular service, indicate "no charge". Assume both a custom and a complete (full pack) for each of the above moves. (See below for quantities.)
      • 8 - dish packs
      • 25 - 1.5 cu cartons
      • 15 - 3.0 cu cartons
      • 12 - 4.5 cu cartons
      • 4 - 6.0 cu cartons
      • 10 - wardrobe cartons
      • 1 - twin mattress carton
      • 2 - king mattress carton
      • 3 - twin mattress carton
      • 10 - mirror cartons
   
   Notes: Include shuttle cost at destination (separate line).
   The costs shown on the bills of lading for these sample moves must reflect the rates/discounts proposed as they will be a factor in awarding points in this section.

5. SWAM Proposal
   Describe 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.

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

- 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

**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 provide a minimum combined single Limit of Liability for bodily injury and property damage of $1,000,000 per occurrence with coverage for the following coverage:

**Commercial/Comprehensive General Liability:**
The Selected Firm(s) and any Subcontractor will provide a minimum Combined Single Limit of Liability for bodily injury and property damage of $1,000,000 per person/occurrence with coverage for:

**Commercial Automobile Insurance:**
The Selected Firm(s) and any Subcontractor will provide a minimum Combined Single Limit of Automobile Liability for bodily injury of $1,000,000 per person/occurrence and property damage of $100,000 per occurrence with the following coverages for vehicles operated by their employees.

{X} Any Automobile {X} Appropriate ICC Endorsement
Cargo Insurance:
The Selected Firm(s) and any Subcontractor will provide an appropriate Motor Truck Cargo Policy with a sufficient amount of coverage to adequately insure its legal liability for the personal property of others being transported on its trucks.

The above insurance will be underwritten by insurance companies licensed to conduct business in the Commonwealth of Virginia and that are rated at least A- by A.M. Best Company.

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

Madison Hall · Post Office Box 400228 · Charlottesville, Virginia 22904-4228
### Firm Information

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<thead>
<tr>
<th>Full Legal Name (Company name as it appears with your Federal Taxpayer Number):</th>
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<tbody>
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<td>Address:</td>
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<td>Web Address:</td>
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<td>Email Address:</td>
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<td>DUNS Number:</td>
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**SWAM Information:**

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<tr>
<th>Is your firm certified with the Commonwealth of Virginia’s Department of Minority Business Enterprises (DMBE):</th>
<th>Yes</th>
<th>No</th>
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<tr>
<td>Minority-Owned Business:</td>
<td>Yes</td>
<td>No</td>
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<tr>
<td>Women-Owned Business:</td>
<td>Yes</td>
<td>No</td>
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<td>Small-Owned Business:</td>
<td>Yes</td>
<td>No</td>
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<th>Is your firm registered as a vendor in the Commonwealth of Virginia’s e-procurement system (eVA)?</th>
<th>Yes</th>
<th>No</th>
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**Point of Contact for this Proposal:**

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<th>Name:</th>
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