



Request for Proposal

Moving & Relocation Services

10 November, 2017

#AC111017



A VASCUPP™ Member Institution
Issued by
Procurement and Supplier Diversity Services
Charlottesville, Virginia

A. GENERAL INFORMATION

Request for Proposal (RFP) Name: Moving & Relocation Services

RFP Number: #AC111017

Issue Date: November 10, 2017

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 Thursday (11/16/2017) at 3 PM EST at 914 Emmet St N, Charlottesville, VA 22903, Michie South Building, Room 301, Charlottesville, Virginia (map may be viewed at this web site: <http://www.virginia.edu/webmap/>). 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 the solicitation with you.

Firms planning to attend the Preproposal Conference should notify ToShun Campbell by email (pur-rfp@virginia.edu) no later than 5:00 p.m. EST on Monday, November 13, 2017 of the names, titles, and phone numbers of the individuals who will attend. Firms traveling to Charlottesville can go to the following website for travel arrangement assistance: <http://www.virginia.edu/placestostay/>

Proposal Due Date: 5:00 PM, December 6, 2018. Firms must submit an electronic original proposal that will be received by the University by the proposal deadline. The electronic original proposal must be submitted *via electronic mail* to UVA Request for Proposals pur-rfp@virginia.edu also copy adc9r@virginia.edu. All electronic proposal documents, whether originals or copies, should be formatted as Microsoft Word documents. The University may, at its discretion, accept late proposals if it is determined to be in the best interest of the University.

Any trade secrets or proprietary information submitted with a proposal (original or copy) for which the firm seeks protection from public disclosure must be clearly identified by the specific page and section number in the proposal and accompanied by a suitable justification requesting non-disclosure.

Negotiations: Negotiations, if needed, will be held on January 15, 2018

Expected Award Date: February 15, 2018

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 or similar terms and conditions, for five 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 and Supplier Diversity Services
1001 North Emmet St, Carruthers Hall
P.O. Box 400202
Charlottesville, VA 22904-4202
Attention: Adeline Coe
Phone: 434-297-4705
Fax: 434-982-2690
Email: adc9r@virginia.edu

- NOTE 1: If RFP proposal is sent U.S. Postal Service, use the P. O. Box. 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 Les Haughton, Director 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 and Supplier Diversity 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 and Supplier Diversity 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 ensure 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, lab equipment and supplies, and office moves 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 a binding 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 known costs including storage.
 - a. Binding estimate will be based on and include the actual review of the origin, storage if required, and final destination and include all known costs. Should any situation arise in which vendor(s) should have taken into account in deriving its binding estimate, any additional costs will be the responsibility of the vendor(s) and will not be passed along to the University.
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 employees all services as outlined in the Selected Firm(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. Describe any resources you have to advise new UVA employees on IRS policies and guidelines pertaining to moving and relocation.
12. 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 same area 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 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 prospective house, baking 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.

13. Refer new University employees to UVA and community resources available to them to help with the transition and provide any additional services that cannot be met by the University or community. Examples include: family transition, spouse/partner career transition, child and elderly care, and mortgage counseling services as requested.
14. Assist with smaller moves including, but not limited to (PODS) and self-moving vans
15. Possess a green/sustainability program whereby boxes and other moving supplies are provided for reuse or are removed by the Selected Firm(s) and not put in Charlottesville Area landfills.
16. Agree to be evaluated and to participate in the University's Survey and Scorecard program.

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 price proposal; and
3. The firm's response template which includes the firm's experience and references, agreement to terms and conditions and the firm's Small, Woman-owned and Minority-owned (SWAM) business 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 in Attachment 1 and refer to the following site:

www.procurement.virginia.edu/main/publicpostings/rfp/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 Les Haughton, Director Supplier Diversity, at (434) 924-7174 or lh7sn@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. RFP Response Template
2. 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:
 - i. Capability of analyzing relocation requests and making recommendations
 - ii. Effective procedures for complaint resolution and problem escalation
 - iii. Flexible procedures for the placement of orders
 - iv. Emergency service to include weekends and holidays
3. Firm(s) Information, Personnel, References.
 - a. Describe the national firm and the designated local agency, its size, number of employees, and annual sales. This should include:
 - i. National Firm
 1. Brief history of the National Firm, emphasizing its services to higher education and/or to major corporate accounts;
 2. And 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;
 3. A copy of the Firm's Interstate Commerce Commission (ICC) certificate describing the National Firm's scope of authority;
 4. A copy of the National Firm's current tariff and supplements;
 5. A description of the National Firm's road equipment dispatch system
 6. A description or examples of the National Firm's and local agent(s)' driver training and safety programs. Include copies of any service awards, if applicable;
 7. A description or examples of the National Firm's and local agent(s)' packer training and safety program. Include copies of any service awards, if applicable;

8. Samples of any literature or programs to be provided to University employees and their families to prepare them for relocation;
 9. A description of the procedure for estimates (including review at origin and destination, verification of completion of all packing and unpacking services authorized and verification of completion of all packing and unpacking services authorized and verification of completion of all services, include claims, billing, and customer survey);
 10. A description and example of the Firm's claim follow-up and settlement procedure. Include copies of all applicable forms;
 11. A description of any other services offered by the National Firm, such as automobile handling, pet handling, movement of plants, expert packing, etc.;
 12. A description of the National Firm's commitment to the University in terms of resources, personnel, investment, etc.; and
 13. A copy of the National Firm's most recent financial statements.
- ii. Local Agents
1. The number of employees, annual sales, quantity of road equipment, and location of the local agency designated for the University's account;
 2. The name and a brief history of the Firm's local agency;
 3. An organizational chart of the Firm's local agency;
 4. A list of local agents which have warehouse facilities;
 5. Resumes of the customer service representative who will be directly responsible for the University's account
 6. A detailed description of the local agent(s)' present pack and load percentage with three references that can verify this;
 7. A description of the warehouse facilities of the designated local agent(s);
 8. A description of the local agent(s) commitment to the University in terms of resources, personnel, investment, etc.;
 9. A copy of the local agent(s)' most recent financial statements;
 10. Describe the local agent(s)' general experience in providing services of the nature the University seeks.
- b. Provide a list of all the firm's clients comparable to the University indicating the length of service of each account. Please provide contact names, email addresses, phone numbers, and year 2017 shipment totals tendered to the local agent(s) by these references
- c. Provide three clients lost within the last three years which includes:
- i. A contact name and telephone number
 - ii. Length of service at the account
 - iii. Reason for the loss

4. Financial Proposal
 - a. Describe the firm's financial proposal including, but not limited to, fees for:
 - i. Packing/Loading services, including small and larger clients
 - ii. Unpacking/Unloading services
 - iii. Appliance servicing (disconnect, preparation for transport, reconnect)
 - iv. Extra pickup and deliveries
 - v. Short terms storage in the event new housing is not immediately available
 - vi. Transportation services including surcharges
 - vii. Tariff Rates
 - viii. Insurance Rates
 - ix. Real Estate Services
 - x. Any other relevant fees
5. 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. Please consider origin and destination additional transportation charges that would apply. Assume both a custom and complete (full pack) for each of the moves. Include shuttle costs on a 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. Additional details provided:
 - i. Intra-state move from Arlington, VA (22204) to Charlottesville Virginia (22904)
 1. 9000 pounds
 2. A grand piano
 3. A riding mower
 4. Washer/dryer service at both origin and destination
 5. 8 – dish packs
 6. 23 – 1.5 cu cartons
 7. 15 – 3.0 cu cartons
 8. 12 – 4.5 cu cartons
 9. 4 – 6.0 cu cartons
 10. 10 – wardrobe cartons
 11. 3 – twin mattress carton
 12. 2 – king mattress carton
 13. 10 – mirror cartons
 - ii. Chicago, IL (60605) to Charlottesville, VA (22911)
 1. 9000 pounds
 2. A grand piano
 3. A riding mower
 4. Washer/dryer service at both origin and destination
 5. 8 – dish packs
 6. 23 – 1.5 cu cartons
 7. 15 – 3.0 cu cartons
 8. 12 – 4.5 cu cartons
 9. 4 – 6.0 cu cartons
 10. 10 – wardrobe cartons

11. 3 – twin mattress carton
12. 2 – king mattress carton
13. 10 – mirror cartons
- iii. Lab move from San Francisco, CA (94134) to Charlottesville Virginia (22901)
 1. One 2,000 pound electron microscope
 2. 9000 pounds of additional equipment including
 - a. Glassware
 - b. Clean room materials
 - c. Freezers
 - d. Hoods
 - e. Incubators
 - f. Samples & reagents
 3. Climate truck with outlets & trailer for transport
 4. Supplemental insurance, if applicable
 5. Unloading/Unpacking/Inside delivery
- iv. Small container move from Raleigh NC (27612) to Charlottesville, VA (22904)
 1. 1 bedroom apartment
- v. 1 automobile move from Phoenix Arizona (85023) to Charlottesville, VA (22901)
- vi. International Move from Leipzig, Germany to Charlottesville Virginia (22901)
 1. 9000 pounds
 2. A grand piano
 3. 8 – dish packs
 4. 23 – 1.5 cu cartons
 5. 15 – 3.0 cu cartons
 6. 12 – 4.5 cu cartons
 7. 4 – 6.0 cu cartons
 8. 10 – wardrobe cartons
 9. 3 – twin mattress carton
 10. 2 – king mattress carton
 11. 10 – mirror cartons
- b. Additional considerations to include:
 - i. \$100,000 full replacement value protection requested by the employee *If no charge, please indicate “no charge”
5. Describe Firm’s additional services that may be of use to the University, including but not limited to: real estate assistance, family transition, spouse/partner career transition, child and elderly care, and mortgage counseling service.
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.
6. Provide a list of institutions of higher education with which the firm has signed a term contract.
7. Provide the amount of annual sales the firm has with each VASCUPP Member Institution. A list of the VASCUPP Members can be found at <https://vascupp.org>
8. Complete and return the information requested in Attachment 2, Firm Information.

NOTE: Virginia Freedom of Information Act

Except as provided, once an award is announced, all proposals submitted in response to this RFP will be open to inspection by any citizen, or interested person, firm or corporation, in accordance with the Virginia Freedom of Information Act. Trade secrets or proprietary information submitted by a firm prior to or as part of its proposal will not be subject to public disclosure under the Virginia Freedom of Information Act only under the following circumstances: (1) the appropriate information is clearly identified by some distinct method such as highlighting or underlining; (2) only the specific words, figures, or paragraphs that constitute trade secrets or proprietary information are identified; and (3) a summary page is supplied immediately following the proposal title page that includes (a) the information to be protected, (b) the section(s)/page number(s) where this information is found in the proposal, and (c) a statement why protection is necessary for each section listed. The firm must also provide a separate electronic copy of the proposal (CD, etc.) with the trade secrets and/or proprietary information redacted. *If all of these requirements are not met, then the firm's entire proposal will be available for public inspection.*

IMPORTANT: 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/fees 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: <http://www.procurement.virginia.edu/main/publicpostings/rfp/mandatoryprovisions.pdf>
- 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
<http://www.procurement.virginia.edu/main/publicpostings/rfp/resolution.pdf>
- Background Checks
The Selected Firm will maintain a mandatory background check and drug and alcohol-testing program for all employees. A Criminal History Records Check must be completed through the Virginia State Police for each staff member. If the check reveals any of the following, the Selected Firm will not assign that individual to perform services for the University:
 1. Any Felony
 2. Any of the following misdemeanor offenses, regardless of when the conviction occurred
 - Burglary
 - Breaking & Entering
 - Robbery
 - Theft
 - Larceny
 - Any Sexual Offenses
 3. Any of the following misdemeanor offenses if convicted with the previous five years:
 - Forgery
 - Fraud
 - Assault and Battery
 - Weapons Violations
 - Possession, distribution, sale or delivery of a controlled substance
 - DUI or DQI (for positions involving vehicle operation)

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 \$1,000,000 per occurrence with the following coverages for vehicles operated by their employees. {x} Any Automobile {x} Appropriate ICC Endorsement 9

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."

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 above, certain matters will automatically be deemed part of the proposal.

Attachment 1

Vice President for Finance's Request for Commitment

Greetings:

The University of Virginia is able to deliver excellent education, research, healthcare, and public service because the high value support from you and all our suppliers of goods and services. Thank you for sharing our commitment to excellence. As a University, we are committed to diversity within our students, our faculty and staff, and our vendors and contractors. An important part of our procurement program involves our commitment to doing business with small, women- and minority-owned (SWaM) businesses. We look to you to help us achieve this objective.

We currently have a substantial volume of activity with small firms; however, we are striving to increase the number of substantial, long-term business relationships with minority-and women-owned businesses. We need your help here.

I have two requests: First, I ask that you actively seek out opportunities to involve small, women-and minority-owned businesses as you deliver services to UVA. Our team in Procurement and Supplier Diversity Services will assist you in identifying qualified diverse business partners. Second, please report your success in this area through our quarterly subcontracting reports – this is critical in quantifying how well we are meeting our goals. The terms and conditions previously provided to your organization outlined this process.

This effort is important to the University. We truly appreciate your efforts to join us in this commitment and partnership towards excellence.

Sincerely,



Melody Bianchetto
Vice President for Finance

Attachment 2
Firm Information

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

Address:

Telephone Number:

FAX Number:

Web Address:

Email Address:

DUNS Number:

SWAM Information:

Is the firm certified with the Commonwealth of Virginia's Department of Small Business & Supplier Diversity (SBSD): Yes No

Minority-Owned Business: Yes No

Women-Owned Business: Yes No

Small-Owned Business: Yes No

Is the 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: