

Request for Proposal Household Moving Services

From:

Relocation Systems, LLC

Dulles, VA

June 29, 2007



Prepared by:
Relocation Systems
North American Van Lines
5001 US Highway 30 West
Fort Wayne, IN 46818

CONTENTS

Attachment 1	4
REQUEST FOR PROPOSAL (RFP)	4
B. OFFEROR(S) INFORMATION, PERSONNEL, REFERENCES.....	9
B.1.2 INTRA/INTERSTATE AGENTS.....	9
B.2 INTERSTATE AGENTS.....	18
10.2. SPECIFIC PROPOSAL REQUIREMENTS:.....	23
 Attachment A.....	 25
OFFEROR'S DATA SHEET	25
 Attachment B.....	 27
SMALL BUSINESS SUBCONTRACTING PLAN	27
 Attachment C.....	 30
PROPRIETARY/CONFIDENTIAL INFORMATION IDENTIFICATION	30
OFFEROR ATTACHMENT D	ALL PROVIDED AT END OF RFP
ICC	
FINANCIAL STATEMENTS	
ORGANIZATION CHART	
BOXES AND PACKING MATERIAL	
HAULING RATIO CONFIRMATION	
 EXHIBIT 1 PROVIDED	 RATES AND 400N TARRIFF

PROPRIETARY AND CONFIDENTIAL RESPONSE

Response to Request for Proposal for Employee Household Relocation Program, prepared exclusively for the Commonwealth of Virginia. Contents include material, non-public financial information and may not be shared outside of the Commonwealth of Virginia in any format without prior express written permission of North American Van Lines

ATTACHMENT 1

REQUEST FOR PROPOSAL (RFP)

Issue Date: 05/21/2007 **M**

RFP #86 - Folder # 15843

Title: HOUSEHOLD MOVING SERVICES

Commodity Code: 96256

Issuing Agency: Department of General Services
Division of Purchases and Supply
1111 E. Broad Street, 6th Floor
Richmond, VA 23219

Authorized Contract Users: State Agencies, Institutions of Higher Education, Public Bodies, Community Service Boards, Cities, Counties and other entities can be authorized to use these contracts in accordance with the Code of Virginia

Initial Period Of Contract: September 1, 2007 or a mutually agreed upon start date through July 31, 2010, with two (2) annual renewable options.

Sealed Proposals Will Be Received Until 1:00 p.m. June 29, 2007. For Furnishing The Goods/Services Described Herein.

Proposals will be opened on July 2, 2007 at 10:00 a.m.

All Inquiries For Information Should Be Directed, in writing, to: Bob Parolisi via e-mail: robert.parolisi@dgs.virginia.gov or via fax: (804) 786-5413.

Note: This public body does not discriminate against faith-based organizations in accordance with the Code of Virginia, § 2.2-4343.1D or against an Offeror because of race, religion, color, sex, national origin, age, disability, or any other basis prohibited by state law relating to discrimination in employment.

IF PROPOSALS ARE MAILED, SEND DIRECTLY TO ISSUING AGENCY SHOWN ABOVE. IF PROPOSALS ARE HAND DELIVERED, DELIVER TO: Department of General Services, Division of Purchases and Supply, 1111 E. Broad Street, 6th floor, Reception Desk, Richmond, VA 23219

In Compliance With This Request For Proposal And To All The Conditions Imposed Therein And Hereby Incorporated By Reference, The Undersigned Offers and Agrees To Furnish The Goods/Services In Accordance With The Attached Signed Proposal Or As Mutually Agreed Upon By Subsequent Negotiation.

Name And Address Of Offeror(s):

Relocation Systems	Date:	June 26, 2007
22884 Cedar Green Road	By:	
Sterling, VA		(Signature in Ink)
	Name:	Mark Morgan
		(Please Print)
Zip Code: 20166	Title:	Director, National Accounts
FEI/FIN No. 54-1817210	Phone:	(703)925 9556
DUNS No. 961940533	Fax:	(703)925 9566

5. Contents of the Proposal: Proposals should include information outlined in this section.

A. Operations:

1. Describe how the Offeror(s) plans to provide relocation services to the Commonwealth, Which is the primary goal of this RFP. Include a description of how the Offeror(s) will work with the Commonwealth to provide this service.

Why North American?

North American prides itself on the highest quality standards and processes for providing moving services. As you review our proposal, the Commonwealth of VA will recognize why North American has a successful and proven track record—here is why:

North American brings ...

A proven track record, dedicated service and quality services developed around our solid expertise in moving—exceptional services around the globe.

- ❑ **Moving Expertise**—Over the decades, we have grown both physically and technologically and are considered one of the most innovative companies in the industry. North American consistently sets the standard in the moving industry—from being the first moving company to use satellite communication with our van operators, to developing the first of its kind, Moving Information Made Simple (M.I.M.S.) paperwork and data transport system.
- ❑ **Personalized Relocation Process**—Our innovative *Home-to-Home®* process is designed to detail and monitor every step of the relocation and focuses on achieving total customer satisfaction. This program guarantees that all of the customer’s needs and expectations are fully understood and met.
- ❑ **Experienced Staff**—Our staff is comprised of relocation professionals—from agents to packers—with many years experience in the moving services industry.
- ❑ **Customer Focus**—North American developed the Quality Index system to track and report on our performance as perceived by our customers. Further, we have developed several key programs that monitor and measure our services.
- ❑ **Investments in Technology**—North American has invested in research and development that has established us as a recognized leader of innovation in the moving and storage industry.
- ❑ **Administration Management Ease**—We can simplify administrative management by providing a single program solution.

North American’s knowledge and expertise in providing customers with quality moving services is unparalleled in the industry. Based on our extensive experience and

continuous commitment to quality and performance, we are confident we can provide a fully integrated, efficient and cost-effective relocation program.

2. Provide a plan of operation to achieve the objectives set forth in Section 3, "Statement of Needs", Include a listing of all steps of service, from initial request through invoicing.

Estimates, Invoicing and General Inquiries

- 1) Relocation Systems will contact the transferee within 24 hours of the initiation.
We will contact them for the pre-move survey within 48 hours of the initiation.
 - 2) We do require site visits prior to providing estimates. This will enable us to manage the cost for The Commonwealth. If any unusual items appear in the site visit we will communicate this to you and your staff.
 - 3) We have the capability to be flexible when a site survey cannot be performed. We can conduct a phone survey with the transferee and determine what resources are going to be required. Estimating is not an exact science and we will always try to be within 15% of the estimated weight.
 - 4) Relocation Systems will provide The Commonwealth with estimates of relocations in order to obtain a budget figure. We will provide written estimates for domestic and international based on a weight that is determined by the site survey. We can provide these estimates within a 48 hour time frame. In most cases it can be accomplished within 24 hours. Mark Morgan or Robin Richardson will be able to provide this service.
 - 5) We will set up our home to home process that includes contacting the transferee with written confirmation of their moving dates. A follow up call 3 days prior to the packing will be preformed. A call on the day of packing, loading and 24 hours prior to delivery will achieve the necessary communication to accomplish a worry free move.
3. Describe the Offeror(s)'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
 - c. Flexible procedures for the placement of orders
 - d. Emergency service to include weekends and holiday

Move Counselors/Customer Service Representatives

Our Move Counselors are our direct customer contact with your transferees and receive focused training to ensure excellence in this critical performance area. Formal customer service training includes class work, as well as desktop observation working alongside experienced coordinators. The coordinators also need to develop specialized expertise in preparing all the required paperwork, inputting all orders into

the North American system for order tracking, activity oversight, billing and reporting, etc.

With the development of North American's web-based training programs, sales and customer service personnel have 24/7 access to information designed to help them in becoming subject-area experts on every facet of moving—everything from estimating accuracy to valuation to the latest trends in moving.

Personalized Relocation Strategy

At North American, we realize that in order to create a personalized relocation strategy for our customers we need to determine their unique needs and expectations. That is why we take a systematic approach to managing national account relocations.

- **Getting to know each other**—Understanding how we can make moving easy for you and your employees.

North American's many unique service capabilities enable us to develop a relocation management process that is right for you and your employees.



- **Customizing your relocation strategy**—North American's systematic approach addresses your organization's specific relocation needs. Every relocation adheres to a step-by-step move management process.



- **Implementing the plan**—Plan implementation is the single most important process when it comes to making moving easy. We have created processes and procedures to educate all members of the relocation team that will be managing your account. We take this one step further by including your relocation department in the communication process to ensure all critical areas are being addressed to everyone's satisfaction.

Accountability—Tracking our efforts—We continually monitor the services of our national accounts through our Customer Awareness Program. This internal monitoring program has several features that quickly address concerns or trends that may result in service issues as well as identify exceptional quality. We schedule periodic meetings to review and identify The Commonwealth's current needs in order to make the necessary adjustments to your relocation strategy

We will provide a 24 hour cell phone number for any issues that arise after hours or on holidays or weekends.

Orders can be placed via fax, email, efax or telephone. Our customer service representative will always have a back up person that The Commonwealth will be able to reach. Our vertical training of all our team members allows seamless operation when a coordinator is out for a day or a week.

B. Offeror(s) Information, Personnel, References

B.1.1. Describe the National Offeror and the designated local agent, its size, number of employees, and annual sales. This should include:

B.1.2 INTRA/INTERSTATE AGENTS

- a. Provide a brief history of the National Offeror, emphasizing its services to Higher Education and/or to major corporate accounts.
- b. An organizational chart indicating which individuals or positions will have knowledge of an Agreement with the Commonwealth, and the degree to which each person will be responsible to the Commonwealth's account
- c. Number and location of agents or representatives including an up-to-date agency directory if available
- d. A copy of the Offeror's Interstate Commerce Commission (ICC) certificate describing the National Offeror(s)'s scope of authority
- e. A list of road equipment owned and operated by the local agent(s) and a separate list operated by the National Offeror(s)
- f. A copy of the National Offeror(s)'s current tariff and supplements

- g. Provide information on the company provided insurance for the employee's or retiree's household goods while in possession by common carrier, packing, in-transit storage or unpacking
 - h. A description of the National Offeror(s)'s road equipment dispatch system
 - i. A description or examples of the National Offeror(s)'s and local agent(s)'s driver training. Include copies of any services awards, if applicable
 - j. A description or examples of the National Offeror(s)'s and local agent(s)'s packer training and safety program. Include copies of any service awards, if applicable
 - k. Samples of any literature or programs to be provided to Commonwealth employees and their families to prepare them for moving
 - l. A description of the procedure for verification of completion and the extent of all packing and unpacking services authorized
 - m. A description and example of the National Offeror(s)'s claim follow-up and settlement procedure. Include copies of all applicable forms.
 - n. A list of local agents which have warehouse facilities
 - o. A description of any other services offered by the National Offeror(s), such as automobile handling, pet handling, movement of plants, expert packing, etc.
 - p. A description of the National Offeror(s)'s commitment to the Commonwealth in terms of resources, personnel, investment, etc., and
 - q. A copy of the National Offeror(s)'s most recent financial statements
- A through q are summarized below;

North American Van Lines (North American) offers moving services solutions for corporations

and state agencies that need to maintain strict control over their expenses and, who envision the larger relocation picture. A key element of any relocation policy is its ability to help a company recruit, retain and re-deploy employees. It should allow the employee to focus on their work and family responsibilities as much as possible.

We are confident that we can provide a program customized for your specific requirements while providing high quality service from our agents and drivers. We understand the importance of selecting a service provider that can offer moving services to help you meet the needs of your relocation policy throughout the year.

Our Philosophy

At North American, our goal is to make moving easy for you and your employees.

North American is a full service transportation entity utilizing the manpower, facilities, and equipment in 500 agent locations in the U.S. and Canada and over 1,000 agent locations worldwide. North American operates one of the largest van operator fleets in the industry with more than 2,700 units on the road. Managing capacity has become one of the biggest challenges to the moving industry today. North American has been able to increase capacity through our Capacity Resource Team (CRT) and the North American Capacity Calendar. Through these exclusive programs, we have been able to add capacity quickly without jeopardizing our ability to deliver top-quality service.

North American Van Lines has been “Making Moving Easy” since 1933. Moving can be a stressful experience not only for the transferring employee and family, but for the employer as well. North American Van Lines’ and Relocation Systems continued commitment to excellence and focus on performance-based initiatives ease the anxieties of the relocating employee while simplifying the moving process for The Commonwealth of VA Corporate Background

North American brings ...

A team of dedicated people to help facilitate your employees moving experience.

North American Van Lines was formed in 1933 in response to the demand created by an ever increasingly mobile American public and has become the largest and most diversified van line in the world. Clayton, Dubilier and Rice (CD&R) acquired North American Van Lines in 1998 and later purchased Allied Van Lines to form SIRVA, Inc. Our parent company, SIRVA, Inc., became a public company in November 2003 and is comprised of two business segments: Relocation Solutions—North America, Relocation Solutions—Europe and Asia Pacific.

Yesterday

North American Van Lines was founded in 1933. A group of 12 agents created the original North American Van Lines network and quickly built their network to 120 agents by 1938. In the years that followed, growth continued, with the addition of North American International in 1952. These steps took the organization past its U.S. borders and North American truly became a global provider.



Today

North American Van Lines is part of SIRVA, the world's largest global relocation and moving services company. SIRVA is a group of companies whose focus is to service every aspect of the relocation process. SIRVA's worldwide operations include more than 6,000 associates, over 1,000 agency locations in over 40 countries with revenues over \$2 billion. Through the resources of SIRVA, North American Van Lines is able to provide household goods transportation both domestically and internationally as well as full service relocation services.

Tomorrow

Through acquisition, diversification and growth, we will continually add value to our customer relationships. We will bring new services and investments in innovative technologies, while gaining economic efficiencies.

SIRVA's Westmont, IL headquarters



An organizational chart is attached. The account representative will be Mark Morgan and he will be the main contact for any issues that arise about the agreement. The main account coordinator will be Robin Richardson. Robin will have the day to day duties of contacting and simplifying the move process for the transferee. Shannon Challberg as the office supervisor will also have a working knowledge of the agreement as well as each transferee's needs.

As the owner of Relocation Systems John Licata will also have full knowledge of the agreement with the commonwealth.

An up to date agency directory has been provided for this RFP.

North American Van Lines has full 50 state hauling authority with the ICC.

Equipment for Relocation Systems	
<i>Moving Vans</i>	35
<i>Flatbed trailers/ birdcage</i>	5
<i>Tractors</i>	25

<i>Straight trucks</i>	<i>15</i>
<i>Dollies</i>	<i>unlimited</i>
<i>Masonite</i>	<i>unlimited</i>
<i>Moving pads and protection</i>	<i>unlimited</i>

North American and Relocation Systems has over 2700 pieces of road equipment for use in providing The Commonwealth of VA with moving service.

Agent Network

North American Van Lines has one of the world's largest agent networks with over 1,000 worldwide agency locations. This vast network of quality agents provide the coverage, capacity and consistent service that our customers demand, when it comes to domestic and international household goods relocation.

Van Operators

The success of every move is closely tied to the quality of the van operator. North American Van Lines has developed successful performance measurements in order to ensure that only the best available operators are selected to service every corporate customer.

North American Van Lines invests in the recruitment and training of these important individuals and continuously monitors, recognizes, and rewards their quality work. Van operators receive individualized, hands-on training through the use of our Safe-Trac® located at our training facility in Fort Wayne, Indiana. This unique 14-acre course simulates driving situations, including shifting, docking, obstacle evasion, and parking. The North American Safe Trac® is complete with traffic lights and a three-way communication system between the observation tower, driver and instructor.

Hands-on training, complemented by classroom instruction, exposes them to all standardized processes and procedures in furniture handling, paperwork completion, safety compliance, customer service, etc. All of this translates to a more professional driver and a more comfortable, less stressful move for our customers.

ICC Certificate is attached

The tariff that will be used is the 400 n. A copy has been provided. Exhibit 1

Insurance is provided with Full Value Protection up to 100,000 of value at no charge.

See copy of agreement attached for specific details. Exhibit 1

Capacity Management

Managing capacity has become one of the biggest challenges to the moving industry today. The cyclical nature of our business has led us to develop programs that create incremental capacity allowing us to service customers when their demand is greatest.

Meeting Customer Demands

Capacity Resource Team and Customer Service Calendar—created to specifically manage driver and seasonal capacity shortages.

- ❑ **North American Van Lines fleet**—Operates one of the largest fleets in the industry with more than 2,700 units available to service your relocation needs.
- ❑ **Capacity Resource Team (CRT)**—We maintain a network of selected agents located throughout the country that use trained crews to load specially equipped air-ride trailers. These agents support a dedicated fleet of haulers who transport the trailers non-stop to their final destination. Once at the destination, a certified crew provides delivery service.
- ❑ **Auto Transportation**—A network of providers augment our car haulers and “on van” capacity during peak periods.
- ❑ **Customer Service Capacity Calendar**—North American’s Customer Service Calendar is a capacity management tool that displays available capacity. This forecasting tool calculates available capacity, by day, allowing us to be proactive in providing space for our national account customers.

Like most national accounts, we expect that VA Commonwealth will place demands on North American Van Lines during the peak periods. We are comfortable that our capacity planning will be able to meet and exceed your requirements—helping us provide services when VA Commonwealth needs them the most.

Packers mastering the art of packing is crucial to a successful move. North American Van Lines provides our agent family with training material, best practice information, quality feedback and “train the trainer” training.



The packing curriculum develops customer service skills that focus on using the right packing materials for each situation. Specialists build customized crates for valuables such as; marble tabletops, trophies,

chandeliers, fine art, antiques, large, odd-sized and fragile items. Simulation training enables us to focus on everything from the intricacies of packing china and stemware to preparing delicate collections for transport.

The North American Van Lines packing curriculum includes the following:

- ❑ Claim free packing techniques.
- ❑ Customer service skills.
- ❑ Quality feedback.
- ❑ Best practices.
- ❑ Fine art.
- ❑ Odd sized items.
- ❑ China and stemware.
- ❑ Chandeliers.



Our packers and craters perform a vital function in ensuring the safety and security of your employee's belongings.

Our team of customer service coordinators will be verifying all details of the move.

Move Counselors/Customer Service Representatives

Our Move Counselors are our direct customer contact with your transferees and receive focused training to ensure excellence in this critical performance area. Formal customer service training includes class work, as well as desktop observation working alongside experienced coordinators. The coordinators also need to develop specialized expertise in preparing all the required paperwork, inputting all orders into the North American system for order tracking, activity oversight, billing and reporting, etc.

With the development of North American's web-based training programs, sales and customer service personnel have 24/7 access to information designed to help them in becoming subject-area experts on every facet of moving—everything from estimating accuracy to valuation to the latest trends in moving.

They will be handling all details of confirming the packing and unpacking services.

CLAIM ANALYST PROCEDURES

All claims received by the company will be analyzed to determine maximum carrier liability. While proficiency in claims analysis comes through experience, one must refer to the applicable tariffs and terms and conditions of the Bill of Lading or contract in the adjustment of loss and damage claims. There are certain basic guidelines that will be followed:

- Was the claim received within the prescribed time frame?
- Check the type of valuation coverage taken and if there is any deductible
- Check to see if there is any property damage, if so, this type of damage should be handled right away and no deductible applies.
- Send the customer a letter notifying them that the claim has been received; this needs to be done within 30 days of receipt of claim.
- Began review of file paperwork with the items listed on the claim form to determine maximum carrier liability.
- Review inventories and exception sheets (if applicable) for driver notes.
- Make note where exception to these items was taken at time of delivery on the inventory.
- Has the customer completed the claim form in its entirety? If not the form needs to be returned to the customer and completed properly. This form must be signed.
- Check to see if the customer provided any estimates, appraisals or other documents to support the amount of the claim.
- Review items on claim form for conditions, if warranted contact a company and arrange an inspection of the damage listed.
- Contact the crew if needed to get their comments on the move.

After the review and inspection (if required) write the customer a letter letting them know of the company's decision regarding their claim, and send a check if required.

Our goal is to provide claim settlement in 30 days or less. Our current average claim settlement is 12 days.

Our local agent directory has been provided with a list of warehouses.

Our commitment to the Commonwealth is that we will be accountable for all aspects of the relocation and moving process.

Van Operators

North American Van Lines stringent qualification processes, classroom instruction, hands-on training programs and performance monitoring procedures ensure we employ only the best drivers in the industry. We believe you need to go beyond just training processes and procedures. Providing an environment based on “education through experience and interaction” that is open to questions and experimentation, rather than just providing facts, increases retention and self satisfaction with the learning experience. Drivers and packers are continually monitored and evaluated to ensure that quality standards are being met. This intensive training program includes:

- ❑ North American Van Lines 14-acre driving course – Safe-Trac®.
- ❑ Classroom instruction and hands on learning activities.
- ❑ Specialized training in packing, padding, loading, tiering and securing.



All of this translates to a more professional driver and a more comfortable, less stressful move for our customers.

A copy of our recent financial statements is attached.

B.2 INTERSTATE AGENTS

- a. The number of employees, annual sales, quantity of road equipment, and location of the local agency designated for the Commonwealth’s account.

Relocations Systems has between 50 full time employees. Our annual sales are consistently in the 10 to 11 million dollar range. We are located in Sterling VA with two state of the art warehouse operations that can provide up to 1100 storage vaults.

- b. The name and a brief history of the Offeror(s)’s local agent

Relocation Systems provides quality, affordable, relocation, logistics, mobility and transportation solutions for families and business worldwide. Our team members are committed to exceed customer expectations through a client focus, continuous quality improvement, training and innovation, while providing value to our customers and ensuring superior growth and profitability. At TeamRELO, we recognize our business

grows with satisfied customers. Team Relo is a family owned company that is 10 years old. We have grown to become the 4th largest agent in the North American system and have a hauling ratio of over 100%. We have two state of the art warehouses in Northern VA with a state of the art training facility available for our crews.

Relocation Systems is a family owned operation that was started in 1996 by John Licata. John's commitment to the company is unsurpassed in his dedication and oversight of the company.

- c. An organizational chart of the Offeror(s)'s local agency indicating which individuals or positions would have knowledge of an Agreement with the Commonwealth, and the degree to which each person would be responsible to the Commonwealth's account. Resumes of employees of the local agency who will be directly responsible for the Commonwealth's Account

Provided as an attachment

- d. The name, location, and the telephone number of one local customer service representative responsible for the Commonwealth's account

Robin Richardson 1800 798 7356 x3018

- e. A detailed description of the local agent's present pack and load percentage with three references that can verify this.

We currently are operating at a 104% load ratio as it relates to our hauling percentage. I have included a report that shows our current hauling status with North American Van lines. Contact Kevin Murphy at 260 429 1682 for verification. John Licata 703 925 9556. Kennis Jarvis 260 429 1682

- f. A description of the warehouse facilities of the designated local agent(s)

Relocation Systems has two state of the art warehouses in Northern Virginia. We can provide over 1200 vaults for secure storage along with climate controlled storage as needed. We have professional racking to store oversized pieces safely. In this manor these items are not pushed into storage vaults and are 100% wrapped with shrink wrap as well as quilted pads then wrapped again with shrink wrap. This ensures that safe storage on all our items is a priority for our company.

- g. A description of the local agent(s) commitment to the Commonwealth in terms of resources, personnel, investment, etc.

Our commitment to the VA Commonwealth is to do our very best each time we handle any aspect of a relocation. We will dedicate our staff and crews to providing you with the best possible service. We will provide all materials and equipment that we have on hand to support your relocation needs. We will commit to 24 hour access to an emergency contact person 7 days a week. Our goal is to provide 100% on time delivery, pick up and claim free moving services.

- h. A copy of the local agent(s)'s most recent financial statements

Attached is the last two years of financials for Relocation Systems

6. Describe the National Offeror(s)'s general experience in providing services of the nature the Commonwealth seeks.
7. Describe the local agent(s)'s general experience in providing services of the nature the Commonwealth seeks.

Relocation Solution

North American Van Lines and Relocation Systems appreciates your request to provide information regarding our moving services capabilities. The Commonwealth expects a relocation program that clearly meets its requirements, time frames and budget. North American is the service partner that can help you to achieve these objectives. Consider our experience...with over 70 years in the transportation industry and the recipient of numerous performance and quality awards, North American is a recognized leader in providing moving services solutions to large multi-national companies and state agencies such as the VA Commonwealth. North American understands the changing landscape of today's business environment and is positioned to be the Commonwealth's comprehensive service partner for all your move management and relocation needs.

We can provide a ...

Tailored relocation program that meets your specific requirements and time lines.

North American Van Lines provides a variety of corporate programs and services for companies on the move. Specialized programs can be custom tailored to meet specialized needs. These specialized services include complete door-to-door services.

Our goal is to deliver unmatched service to our customers on a worldwide basis. In order to achieve this goal we continue to focus on building an organization that takes advantage of our global scale and to provide innovative technology to our customers and agents. It takes a proven service partner with knowledge and expertise to deliver a successful relocation program—North American is uniquely qualified to help the Commonwealth achieve these objectives.

Why North American and Relocation Systems?

North American and Relocation Systems prides itself on the highest quality standards and processes for providing moving services. As you review our proposal, you will recognize why North American has a successful and proven track record—here is why:

North American brings ...

A proven track record, dedicated service and quality services developed around our solid expertise in moving—exceptional services around the globe.

- ❑ **Moving Expertise**—Over the decades, we have grown both physically and technologically and are considered one of the most innovative companies in the industry. North American consistently sets the standard in the moving industry—from being the first moving company to use satellite communication with our van operators, to developing the first of its kind, Moving Information Made Simple (M.I.M.S.) paperwork and data transport system.
- ❑ **Personalized Relocation Process**—Our innovative *Home-to-Home®* process is designed to detail and monitor every step of the relocation and focuses on achieving total customer satisfaction. This program guarantees that all of the customer's needs and expectations are fully understood and met.
- ❑ **Experienced Staff**—Our staff is comprised of relocation professionals—from agents to packers—with many years experience in the moving services industry.
- ❑ **Customer Focus**—North American developed the Quality Index system to track and report on our performance as perceived by our customers. Further, we have developed several key programs that monitor and measure our services.
- ❑ **Investments in Technology**—North American has invested in research and development that has established us as a recognized leader of innovation in the moving and storage industry.
- ❑ **Administration Management Ease**—We can simplify administrative management by providing a single program solution.

North American's and Relocation Systems knowledge and expertise in providing customers with quality moving services is unparalleled in the industry. Based on our extensive experience and continuous commitment to quality and performance, we are confident we can provide a fully integrated, efficient and cost-effective relocation program to the VA Commonwealth.

8. Provide a list of all of the Offeror(s)'s clients comparable to the Commonwealth indicating the length of service of each account. Please provide contact names, phone numbers and year 2006 shipment totals tendered to the local agent(s) by these references.

University of Maryland	Doug Waterman	301 405 5852	7 years of service	8 shipments in 2006
The Washington Post	Joyce Fekkek	202 334 7183	10 years of service	15 shipments in 2006
University of Florida	Gail Morris	352 392 1331	5 years of service	250 shipments
Cornell University	Dan Biechele	607 255 6694	6 years of service	58 shipments

9. Provide a list of all 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
 - Financial Proposal

Federal Bureau of Investigation Ann Tinker or Jack Evans 202 324 5838
10 years of service; lost due to 3rd party securing the business(outsourced)

National Institutes of Health Alicia Jackson 301 496 1595
5 years of service; lost due to 3rd party securing the business (outsourced)

We have been able to replace this business through our referral and account network.

Describe the Offeror(s)'s financial proposal including, but not limited to, fees for:

- Packing/Loading services 64% discount off 400n
- Unpacking/Unloading services 64% discount off of 400n
- Appliance servicing (disconnect, preparation for transport, and reconnect)
\$39, disconnect and hook up; \$30 for each additional piece; \$50 service fee
Front load disconnect and provide kit \$209.00 reconnect \$98.00; \$50 service fee
- Extra pickup and deliveries 64% discount off of 400n
- Short term storage or in-transit storage in the event new housing is not immediately available 50% discount off of sit in 400n
- Transportation services 64% discount off of the 400n
- Tariff Rates 400 n rates provided with bid
- Insurance provided by the Offeror(s) for employee's household goods

Insurance is provided at NO Charge for Full Value Replacement up to \$100,00 of coverage. Cost for amount over \$100,000 will be .65 cents per \$100.00 of value. Value will be provided @ \$7.00 per lb up to \$100,000.

9. Any other relevant fees 3rd party fees attached included in Exhibit 1

10.2. Specific Proposal Requirements:

Proposals should be as thorough and detailed as possible so that the Commonwealth may properly evaluate your capabilities to provide the required goods/services. Offerors are required to submit the following items as a complete proposal:

10.2.1. The complete RFP (including cover sheet) and all addenda acknowledgments, if any, signed and filled out as required.

10.2.2. Completed Offerors Data Sheet, included as Attachment A to the RFP, and other specific items or data requested in the RFP.

10.2.3 Written narrative statement to include experience in providing the services described herein. Offerors should include information substantiating their ability to provide adequate levels of service.

10.2.4 Specific plans for providing services including:

- a. Describe/explain your company's capability to provide and or perform each of the goods and or services identified in Section 3"A" through "M" (specifically address each item within this section)
- b. Describe the types of packing boxes to be furnished by your company.

Provided in attachment

- c. Location of office(s) and hours of operation.

Relocation Systems; Sterling, VA 24 hours 7 day a week operation; office hrs 8 to 5 pm

- d. Describe your capability to accept a charge card payment program.

We accept visa and master card for credit card payment.

- e. Specify whether or not an account manager(s) will be assigned. Describe fully any services provided through the account manager, such as site visits, consultation, problem and/or dispute resolution regarding shipments and invoices, etc.

Customer-Focused Approach

In order to continuously remain one step ahead of our customer's ever-changing needs and expectations, North American works closely with our Account Advisory Council (AAC).

The AAC, comprised of several North American Van Line corporate customers as well as key North American executives, encourages us to constantly 're-think' the way we do business and redesign our approach in order to better serve all of our customers. The AAC meets regularly to develop service delivery initiatives resulting in improved customer satisfaction.

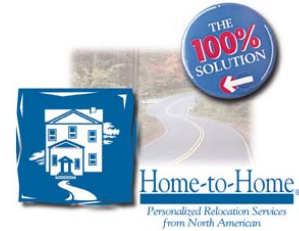
Keeping the customer in mind by providing ...

Peace of mind for families that are moving and administrative ease for you.

In addition to the ACC Mark Morgan will be your account manager. He will do site visits, telephone quality calls and manage the day to day oversight for the VA Commonwealth. Mark will be 100% accountable for any detail that would arise during the relocation process. He can be reached 24 hours on a dedicated cell phone line that all customers will have access to.

Make Moving Easy

The *Home-to-Home*® Process is a step-by-step procedure that outlines every detail of a corporate relocation. A single-point-of-contact will be assigned to you and your relocating employee. By simplifying the process, we ensure all parties involved in the relocation clearly understand what to expect, and when.



Move Management

North American's detailed Home-to-Home move management process provides the framework for creating your customized relocation strategy. Through Home-to-Home, your employees will receive:

- ❑ Advanced pre-move counseling to explain the entire move process.
- ❑ Detailed step-by-step information and management of the move.
- ❑ Cost containment counseling.
- ❑ Quality analysis and review with critical follow-up to ensure complete customer satisfaction.
- ❑ This clearly defined process is now part of our standard operating procedure for every corporate move.

ATTACHMENT A

OFFEROR'S DATA SHEET

1. **QUALIFICATIONS OF OFFEROR:** The Offeror must have the capability and capacity in all respects to fully satisfy all of the contractual requirements.

2. **VENDOR'S PRIMARY CONTACT:**

Name: Mark Morgan Phone: 703 925 9556 Cell: 703 932 4354

3. **YEARS IN BUSINESS:** Indicate the length of time you have been in business providing this type of service. Personally I have been in the business for 20 years.

10 Years 3 Months for Relocation Systems

4. **VENDOR INFORMATION:**

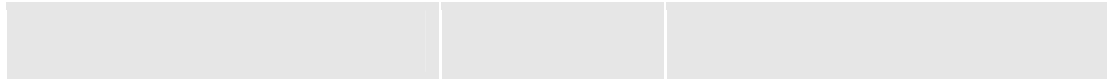
FIN OR FEI Number: 54-1817210
(If Company, Corporation, or Partnership)

SSN: _____
(If Individual)

5. **REFERENCES:**

A. Indicate below a listing of at least four (4) current accounts, either commercial or governmental, that your company is servicing. Include the length of service and the name and phone number of the person the purchasing agency has your permission to contact.

CLIENT'S NAME & ADDRESS	LENGTH OF SERVICE	CONTACT PERSON AND TELEPHONE NUMBER
University of Maryland Physical Distribution Paint Branch Parkway College Park, MD 20742	7 years	Doug Waterman 301 405 5852
NASA/Goddard Space Center Code 239/ blg 16W Greenbelt, MD 20771	7 years	Jean Manall 301 286 9642
The Washington Post 1150 15 th Street NW Washington, DC 20071	10 years	Joyce Fekkek 202 334 7183
General Services Admin 470 LEnfant Plaza SW Suite 8100 Washington, DC 20407	7 years	Mathis Garnder 202 619 8933



ATTACHMENT B

Small Business Subcontracting Plan

Definitions

Small Business: "Small business " means an independently owned and operated business which, together with affiliates, has 250 or fewer employees, or average annual gross receipts of \$10 million or less averaged over the previous three years. Note: DMBE-certified women- and minority-owned businesses shall also be considered small businesses when they have received DMBE small business certification.

Women-Owned Business: Women-owned business means a business concern that is at least 51% owned by one or more women who are citizens of the United States or non-citizens who are in full compliance with United States immigration law, or in the case of a corporation, partnership or limited liability company or other entity, at least 51% of the equity ownership interest is owned by one or more women who are citizens of the United States or noncitizens who are in full compliance with United States immigration law, and both the management and daily business operations are controlled by one or more women who are citizens of the United States or non-citizens who are in full compliance with the United States immigration law.

Minority-Owned Business: Minority-owned business means a business concern that is at least 51% owned by one or more minority individuals or in the case of a corporation, partnership or limited liability company or other entity, at least 51% of the equity ownership interest in the corporation, partnership, or limited liability company or other entity is owned by one or more minority individuals and both the management and daily business operations are controlled by one or more minority individuals.

All small businesses must be certified by the Commonwealth of Virginia, Department of Minority Business Enterprise (DMBE) to participate in the SWAM program. Certification applications are available through DMBE online at www.dmbv.virginia.gov (Customer Service).

Bidder/Offeror Name: _____ Relocation Systems _____

Preparer Name: _____ Mark Morgan _____ **Date:** _____ June 26, 2007 _____

Instructions

- A. If you are certified by the Department of Minority Business Enterprise (DMBE) as a small business, complete only Section A of this form. This shall include DMBE-certified women-owned and minority-owned businesses when they have received DMBE small business certification.
- B. If you are not certified by DMBE as a small business and plan to subcontract part of this contract with a DMBE certified business, complete only Section B of this form.

C. If you are not certified by DMBE as a small business and cannot identify any subcontracting opportunities to subcontract part of this contract with a DMBE-certified business, only provide the information requested in Section C of this form.

Section A

If your Offeror(s) is certified by the Department of Minority Business Enterprise (DMBE), are you certified as a (check only one below):

Small Business

Small and Women-owned Business

Small and Minority-owned Business

Certification number: _____ Certification date: _____

Section B

Populate the table below to show your Offeror(s)'s plans for utilization of DMBE-certified small businesses in the performance of this contract. This shall include DMBE-certified women-owned and minority-owned businesses that meet the small business definition and have received the DMBE small business certification. Include plans to utilize small businesses as part of joint ventures, partnerships, subcontractors, suppliers, etc.

B. Plans for Utilization of DMBE-Certified Small Businesses for this Procurement

Small Business Name & Address DMBE Certificate #	Status if Small Business is also: Women (W), Minority (M)	Contact Person, Telephone & Email	Type of Goods and/or Services	Planned Contract Involvement	Planned Annual Contract Dollar Expenditure Amount
Totals \$					

Section C

Respond to how your business has met or exceeded at least two of the following indicators within the past 24 months. Your response may include any good faith efforts made regarding this procurement.

C. Good Faith Effort Indicators by the Bidder/Offeror

1. Identify areas of work your business has subcontracted to DMBE-certified small businesses for other contracts. Include company names, dates, dollar amounts, and percentages on a per contract basis.
2. List research efforts conducted by your business in the past to locate DMBE-certified small businesses by advertising in publications or in the classified section of the newspaper where small businesses are likely to see it. List specific publications and dates.
3. List small business outreach meetings, conferences, or workshops conducted by your Offeror(s) to locate DMBE-certified small businesses—including the dates, participation numbers, and results.
4. Provide documented correspondence (i.e., certified mail, email, receipt of fax transmissions, etc.) to small businesses from the lists provided by DMBE and other outreach agencies and organizations which indicates your solicitation of such for utilization of subcontracting opportunities on other contracts for which your business has competed.
5. List areas of work which your business has subcontracted with DMBE-certified small businesses for upcoming contracts—including the name of the business, certification number, dates, dollar amounts, and percentages on a per contract basis.
6. Provide documentation of any assistance offered to interested small businesses in obtaining bonds, lines of credit, and/or insurance for any present or past contracts your business has in place.
7. Provide documentation of follow-up on initial contacts with DMBE-certified small businesses (e.g., telephone call logs, emails, certified letters, etc.). Be sure to list the small business name and dates of contact.

ATTACHMENT C

PROPRIETARY/CONFIDENTIAL INFORMATION IDENTIFICATION RFP # 86 – Folder #15843

SECTION/TITLE	PAGE NUMBER(S)	REASON(S) FOR WITHHOLDING FROM DISCLOSURE

Identify the reason for withholding from disclosure by applying the applicable code from below and/or by written explanation.

- A. This page contains information relating to “trade secrets”, and “proprietary information” including processes, operations, style of work, or apparatus, identify, confidential statistical data, amount or source of any income...of any person (or) partnership. See “Virginia Public Procurement Act; Section 11-52 (D)”. Unauthorized disclosure of such information would violate the Trade Secrets Act 18 U.S.C. 1905.
- B. This page contains proprietary information including confidential, commercial or financial information which was provided to the Government on a voluntary basis and is of the type that would not customarily release to the public. See “Virginia Public Procurement Act, Section 11-52 (D); 5 U.S.C. 552 (b) (4); 12 C.F.R. 309.5(c) (4)”.
- C. This page contains proprietary information including confidential, commercial or financial information. The disclosure of such information would cause substantial harm to competitive position and impair the Government’s ability to obtain necessary information from contractors in the future. 5 U.S.C. See “Virginia Public Procurement Act, Section 11-52 (D); 552 (b) (4); 12 C. F. R. 309.5(c) (4)”.

Resumes **Mark B. Morgan**
8635 Waterfall Drive
Laurel, MD 20723
(301) 776-2554

EDUCATION **University of Maryland**, College Park, Maryland
Bachelor of Science, Business Management, December 1984

EXPERIENCE
2/2001- Current

Relocation Systems-North American Van Lines
Director of National Account Sales responsible for the growth of corporate and government sales. Responsible for the cultivation of new business and the account management of existing clients. Chosen to be trained and certified to sell the Sirva Relocation Program as part of the Sirva Elite Team. Twenty years of experience in the selling and supervising of office moving projects, including labs, offices and high value products.

4/88-2/2001

Smith's Moving and Storage-Mayflower Van Lines
Director of National Account Sales responsible for government and corporate sales. Responsible for maintaining and growing National Account Sales as well as attending trade association programs. Achieved >1 million in sales each year, that included office relocations and supervision of office relocation projects.

2/87-4/88

Southland Container, Inc
Responsible for inside sales and the procurement of all inventory. Managed the procurement function to ensure just-in-time deliveries.

2/85-12/86

MCI Telecommunications
Analyzed and developed transportation planning and scheduling for site installations, de-installations, upgrades and special projects. Administered cost controls including carrier rate negotiations and analysis.

Awards

North American top 50 Account Sales 2002, 2003, 2004, 2005.
Mayflower top 5 for GSA Sales 1995,1996, Mayflower top 2 in 1997,
Mayflower Top Ten International Sales and GSA HHG 1998, 1999, and 2000

Certifications

Certified by Sirva as a Trained Relocation Specialist, North American Customer Centric Selling, AMSA Office and Industrial Consultant. Familiar with Gold Mine and Salesforce.com operating systems.

Personal Married. Interests include golf, skiing and travel.

John Licata
12132 Chancery Station Circle
Reston, Va. 20190

EDUCATION **West Chester State College**, West Chester, Pa.
Bachelor of Science, Education, May 1980

James Madison University
James Madison University, Harrisonburg, Va.
MSEd, Education, May 1982

EXPERIENCE
9/1996- Current **Relocation Systems-North American Van Lines**
President and Founder of business. Business development, marketing and general management.

8/1988-9/1996 **Paxton Van Lines, Inc.-Atlas Van Lines**
Assistant Vice President of Sales responsible for government and corporate sales. Responsible for maintaining and growing National Account Sales as well as attending trade association programs. Achieved >1 million in sales each year, that included office relocations and supervision of office relocation projects.

Certifications Certified by Sirva as a Trained Relocation Specialist, North American Customer Centric Selling, AMSA Office and Industrial Consultant. Familiar with Gold Mine and Salesforce.com operating systems.

Personal Married. Interests include coaching wrestling, charitable events and travel.

STEVEN T. LONG

12310 White Eagle Drive
Manassas, Virginia 20112

Residence: 703.791.4644
Mobile: 703.932.8665

STRENGTHS

- | | | |
|---------------------|--------------------|--------------------|
| ◆ Leadership | ◆ Problem Solving | ◆ Flexible |
| ◆ Staff Development | ◆ Customer Service | ◆ Profit-Conscious |

QUALIFICATIONS

More than 14 years of experience in the moving and storage industry. 11 years in warehouse management. Career marked by fast-track promotion through positions leading to Warehouse Manager in February 1996. Noted for significantly decreasing overhead costs related to packing materials, fuel, trash removal, lumber and capital expenditures. Skilled at supervising, developing and training staff of more than 40 employees. Launched successful start-up of three permanent and three temporary storage facilities, including site selection, capital equipment acquisition, inventory stocking and warehouse policy development.

PROFESSIONAL EXPERIENCE

Warehouse Manager – JK Moving & Storage, Inc., Sterling, Virginia 1996-Present

Manage all warehouse operations for a single location, 35 million dollar, fast paced, growing moving company with two warehouses totaling 215,000 square feet. Hire, discipline and motivate warehouse staff of 46. Ensure stocking levels of equipment, fuel and all materials are adequate to support company operations. Interact and negotiate rates for all vendors. Manage the repairs and maintenance of buildings, grounds and equipment.

- ◆ Decreased company cost for packing materials by 77%.
- ◆ Implemented structured procedure to properly estimate, price and bill for the cost of specialty crates. This procedure increased the income derived from crate sales significantly.
- ◆ Reduced overtime cost by implementing a multi-shift 7-hour workday.
- ◆ Consistently achieve top rating from the US Department of Defense and the US State Department for quarterly warehouse inspections.

- ◆ Certified Public Weigh Master for the State of Virginia
- ◆ Regularly called upon by other department heads and employees to offer advice and opinions on unique situations.

Warehouse Assistant Manager – JK Moving & Storage, Inc. Sterling, Virginia 1994-1996

Moving Truck Driver – JK Moving & Storage, Inc. Sterling, Virginia 1993-1994

Moving Truck Helper – JK Moving & Storage, Inc. Fairfax, Virginia 1992-1993

◆ ◆ ◆

ATTACHMENT D

ALL ATTACHMENTS

ICC Form
Financial Statements
Organization Chart
Boxes and Materials
Hauling report

Exhibit 1

Pricing Information

Prepared for

The Commonwealth of Virginia

September 20, 2007



Prepared by:
Relocation Systems
22884 Cedar Green Road
Sterling, VA 20166

Please have written responses prepared, for the questions listed below, to be distributed to the evaluation committee during your presentation on September 19th, 2007

Services

- Do you provide Household Moving Services for interstate and intrastate moves? [Yes we do interstate and intrastate moves.](#)
- Does your company operate in all 48 contingency states? [Yes](#)
- Do you offer climate controlled storage of household goods? [Yes we offer climate storage in Northern Virginia and other locations throughout the 48 states.](#)
- Do you outsource any part of the move? Packers, drivers, storage, unpacking? [No, we do not outsource the move. Services such as installing a plasma TV will be handled by a certified technician.](#)

Pricing

- What is the pricing and any discount for Interstate and Intrastate moves? Please identify all rates / charges for the following Services. If your company has any additional services that are not listed, please include those services in addition to the services listed below:

Services	Interstate	Intrastate	Comments
Packing	64%	40%	Per Tariff
Unpacking	64%	40%	Per Tariff
Loading	64%	40%	Per Tariff
Unloading	64%	40%	Per Tariff
Appliance Servicing	64%		Per Tariff
Extra Pickup and Deliveries	64%	40%	Per Tariff
Transportation Services	64%	40%	Per Tariff
Debris Pickup	\$125 each	\$125.00 each	
Short-Term Storage	50%	40%	Per Tariff
Shipment of Autos	See tariff per mile	Per Mile	Price is based on flat per mile rate
Weekend / Holiday Packing or Loading Charge	64%	40%	Per Tariff

Insurance

- Please identify the insurance coverage provided and the cost associated with the move:

Interstate Moves are provided with our Full Value Protection Repair or Replacement coverage:

- During move Up to \$100,000 of coverage at no charge
- Storage Up to \$100,000 of coverage at no charge
- Delivery Up to \$100,000 of coverage at no charge

Intra Virginia moves as follows

Full Value Protection with \$100.00 deductible @ .85 cents per \$100.00 of coverage

- What is the liability coverage if your equipment or personnel damage the property?
North American and Relocation Systems are fully insured up the \$1,000,000 for each occurrence.

Our certificate of insurance is attached.

Please have written responses prepared, for the questions listed below, to be distributed to the evaluation committee during your presentation on September 19th, 2007

Services

- Do you provide Household Moving Services for interstate and intrastate moves?
- Does your company operate in all 48 contingency states? YES
- Do you offer climate controlled storage of household goods? YES
- Do you outsource any part of the move? Packers, drivers, storage, unpacking? NO

Pricing

- What is the pricing and any discount for Interstate and Intrastate moves? Please identify all rates / charges for the following Services. If your company has any additional services that are not listed, please include those services in addition to the services listed below:

Services	Interstate	Intrastate	Comments
Packing	64%	40%	Per Tariff
Unpacking	64%	40%	Per Tariff
Loading	64%	40%	Per Tariff
Unloading	64%	40%	Per Tariff
Appliance Servicing	64%		Per Tariff
Extra Pickup and Deliveries	64%	40%	Per Tariff
Transportation Services	64%	40%	Per Tariff
Debris Pickup	\$125 each	\$125.00 each	
Short-Term Storage	50%	40%	Per Tariff
Shipment of Autos	See tariff per mile	Per Mile	Price is based on flat per mile rate
Weekend / Holiday Packing or Loading Charge	64%	40%	Per Tariff

Insurance

- Please identify the insurance coverage provided and the cost associated with the move:
- Interstate moves as follows
 - During move \$100,000 of coverage at no charge for Repair or Replacement
 - Storage \$100,000 of coverage at no charge for Repair or Replacement
 - Delivery \$100,000 of coverage at no charge for Repair or Replacement

Intra Virginia moves as follows

Full Coverage with \$100.00 deductible @ .85 cents per \$100.00 of coverage

- What is the liability coverage if your equipment or personnel damage the property? Relocations Systems is fully insured up to \$1,000,000 for each occurrence - Certificate Attached