

Missouri Department of Transportation
David B. Nichols, Director

573.751.2551
Fax: 573.751.6555
1.888.ASK MODOT (275.6636)

CCO Form: GS14
Approved: 02/06 (AR)
Revised: 07/08 (AR)
Modified: 07/13 (BDG)

REQUEST FOR PROPOSALS

RELOCATION SERVICES RFP 6-130910LK TABLE OF CONTENTS

INTRODUCTION.....	3
PROPOSAL.....	3
ACCEPTANCE.....	3
SECTION (1): GENERAL DESCRIPTION AND BACKGROUND	
(A) Request for Proposal.....	4
(B) Background	4
(C) Fiscal Year.....	4
(D) Contract Period.....	4
SECTION (2): SCOPE OF WORK	
(A) Services.....	5
(B) Specific Requirements	5
(C) Optional Services.....	6
(D) Administration of Program.....	6
(E) Potential Additional Consultant Work, As Requested.....	6
SECTION (3): AGREEMENT REQUIREMENTS	
(A) MHTC's Representative.....	7
(B) Release to Public	7
(C) Assignment.....	7
(D) Status as Independent Contractor.....	7
(E) Components of Agreement.....	7
(F) Amendments.....	7
(G) MBE/WBE Participation Encouraged.....	8
(H) Nondiscrimination.....	8
(I) Executive Order	8
(J) Incorporation of Provisions	8
(K) Non-employment of Unauthorized Aliens	9
(L) Proof of Lawful Presence For Sole Proprietorships and Partnerships.....	9
(M) Bankruptcy	9
(N) Law of Missouri to Govern	9
(O) Cancellation	10
(P) Venue.....	10
(Q) Ownership of Reports.....	10

(R)	Confidentiality.....	10
(S)	Maintain Papers	10
(T)	Nonsolicitation.....	10
(U)	Conflict of Interest	10
(V)	Indemnification.....	11
(W)	Insurance	11
(X)	Extension.....	11
(Y)	Invoices.....	12
SECTION (4): PROPOSAL SUBMISSION INFORMATION		
(A)	SUBMISSION OF PROPOSALS	
(1)	Pricing and Signature	13
(2)	Submission of All Data Required	13
(3)	Public Inspection	13
(4)	Clarification of Requirements	13
(5)	RFP Schedule Of Events.....	13
(6)	Oral Presentations.....	14
(B)	REQUIRED ELEMENTS OF PROPOSAL	
(1)	Experience	15
(2)	Personnel.....	15
(3)	References.....	15
(C)	EVALUATION CRITERIA AND PROCESS	
(1)	Experience, Expertise and Reliability	15
(2)	Proposed Method of Performance.....	16
(3)	Pricing	18
(4)	Historic Information.....	19
(5)	Responsibility to Submit Information.....	19
(D)	PRICING	
(1)	Fee Schedule.....	19
SECTION (5): PRICE PAGE		
(A)	FEE SCHEDULE	20

EXHIBIT (A) FIRM’S PRIOR EXPERIENCE

**EXHIBIT (B) PROFESSIONAL AND ADMINSTRATIVE STAFF
BACKGROUND AND EXPERIENCE**

EXHIBIT (C) RELOCATION PROGRAM DATA

EXHIBIT (D) MoDOT RELOCATION ASSISTANCE POLICY

EXHIBIT (E) SAMPLE DEFINITIONS

EXHIBIT (F) SAMPLE CONSULTANT AGREEMENT

LIST OF ACRONYMS

MHTC	Missouri Highways and Transportation Commission
MoDOT	Missouri Department of Transportation
RFP	Request for Proposals

INTRODUCTION

This Request For Proposals (**RFP**) seeks proposals from qualified organizations (**Offeror**) to furnish the described services to the Missouri Highways and Transportation Commission (**MHTC**). One (1) original and four (4) copies of each proposal must be mailed in a sealed envelope to Ms. Leann Kottwitz, Missouri Department of Transportation, Post Office Box 270, Jefferson City, Missouri 65102, or hand-delivered in a sealed envelope to the General Services Procurement Office in the Highway and Transportation Building at 830 MoDOT Drive, Jefferson City, Missouri 65019. Proposals must be returned to the offices of General Services Procurement, no later than **September 10, 2013, 2:00 p.m., local time**.

MHTC reserves the right to reject any and all bids for any reason whatsoever. Time is of the essence for responding to the RFP within the submission deadlines.

PROPOSAL

- (1) The Offeror shall provide a fee proposal to MHTC on the **PRICE PAGE** in accordance with the terms of this RFP.
- (2) The Offeror agrees to provide the services at the fees quoted, under the terms of this RFP.

Authorized Signature of Offeror: _____

Date of Proposal: _____

Printed or Typed Name: _____

Mailing Address: _____

City: _____ State: _____ Zip: _____

Telephone: _____ Fax: _____

Electronic Mail Address: _____

ACCEPTANCE

This proposal is accepted by MHTC.

(Name and Title)

Date

**SECTION (1):
GENERAL DESCRIPTION AND BACKGROUND**

(A) **Request for Proposal:** This document constitutes a RFP from qualified organizations to provide Relocation Services to MHTC and the Missouri Department of Transportation (**MoDOT**). Proposals are being solicited from Relocation Services companies who have experience in the relocation of employees similar to an organization such as MoDOT. The General Services Procurement Unit will coordinate the review of the proposals and select a Firm to award a contract to work with the department. Details of the scope of work, proposal format and Firm selection process are contained in this announcement.

(B) **Background:** MoDOT operates under a decentralized organization with the Central Office in Jefferson City. The Central Office provides staff assistance and functional control for the various departmental tasks in 7 geographical districts. Each district contains about 14 percent of the total road mileage in the state highway system.

MoDOT has responsibilities for five major transportation alternatives available to Missourians -- highways, aviation, waterways, transit, and railroads. These responsibilities include the total operation of the 32,000 mile highway system, including highway location, design, construction, and maintenance.

MoDOT employs approximately 5,100 full-time employees. About 80% of those employees work in the 7 districts with the remainder working in the various functional units of the Central Office.

MoDOT's current relocation policy (See EXHIBIT D) reimburses employees for miscellaneous expenses; mortgage interest differential; bridge loan interest; dual housing; realtor fees; real estate loan fees; closing costs; household goods moving and storage; and reimbursement for temporary quarters while relocating. For information regarding the number of transfers and a three-year history of MoDOT's relocation costs, refer to Exhibit C and sample definitions of relocation terms refer to Exhibit E.

(C) **Fiscal Year:** The fiscal year runs from July 1-June 30.

(D) **Contract Period:** Notice to proceed through one year.

SECTION (2): SCOPE OF WORK

(A) Services: The Offeror shall provide the following professional services:

1. A BVO home sale process.
2. Moving services for household goods for Home sellers.
3. Home marketing assistance.

(B) Specific Requirements: The Offeror will provide to the General Services Procurement Unit one (1) original and four (4) copies of a program proposal which will include the following:

1. Buyer Value Option Services:
 - a. Describe your process for the sale of a home using the buyer value option home sale process. Including a description of potential risks or tax issues involving the Buyer Value Option home sale process and the steps that your Firm takes to manage those risks.

* Please note: MoDOT employees have a choice in department policy to use BVO service or non-BVO service. Only employees who elect to use BVO service will be referred to BVO provider.
 - b. Define the fees and expenses related to this process that will be billed to MoDOT. Example: realtor fees, closing costs, carrying costs, marketing costs, BVO fees, etc.
 - c. Does your firm require the client to pay a deposit up-front to cover expenses? If so, how much?
 - d. Provide historical data as to the percentage of homes that went into inventory using this method of closing.
 - e. Explain your firm's referral recovery fee process for use or non-use of registered brokers to your firms.
2. Management of Household Goods Transportation (only for Home selling employees who elected to use BVO services for Home sale):
 - a. Describe your process for managing the transport of household goods and storage. Also detail any potential for savings to MoDOT.
 - b. Does your firm select the moving company that will handle the move? If so, does your firm regularly use the same moving company or does your selection of moving companies vary? Please list the moving companies used by your organization in Missouri.
3. Home Marketing Assistance:

- a. Describe your process for assisting the transferred employee to successfully market his/her home. Also detail any potential for savings to MoDOT.
- b. Does your firm select the realtor or is the employee allowed to select the realtor? What incentives are in place to encourage the realtor to make a quick sale?
- c. Define any expenses pertaining to home marketing assistance that will be billed to MoDOT that are not in your fee for this service.
- d. Provide historical sales data pertaining to those homes in which you provided home marketing assistance. Example: Days on the market, asking price/selling price, etc.

(C) **Optional Services:** In addition to the Specific Requirements, the Firm may also submit a proposed fee in Section (5), Price Page for any other relocation services that it offers. MoDOT is not obligated to utilize any of the optional services. The optional services do not restrict MoDOT from using other vendors for such services.

(D) **Administration of Program:** The Offeror will consult MHTC's representative regarding any problems involved with the administration of the services provided pursuant to this RFP, without additional fees.

1. Review and outline your administration and accounting procedures;
2. Assist with presentations (when needed) to the Human Resources Director or her/his designee on contract issues;
3. Attend conferences or MHTC meetings at the request of MHTC, and
4. On-site training to ensure organizational implementation of services and products that are required to meet MoDOT organizational needs.
5. Development of Customer Service Manual to be used by the Offeror when assisting MoDOT employees.

(E) **Potential Additional Consultant Work, As Requested:** MHTC reserves the right, and it shall be a term and condition of the final Agreement, that MHTC's representative may request the Firm to continue to perform and provide services to existing employees who may be receiving services from the Firm at the time of the expiration of the contract period for an additional six (6) months. The Firm will continue providing such services at the same service fee rate as agreed to during the contract period and shall not charge any additional fees for the additional six (6) month continuation.

SECTION (3): AGREEMENT REQUIREMENTS

This RFP shall be governed by the following contract provisions. The award of this RFP is subject to a post-award contract. These same contract provisions will appear in the post-award contract agreement similar to Exhibit F. If the parties are unable to agree to terms in the post-award contract, MHTC shall reserve the right to cancel the award of the RFP and contract and select a different offeror.

- (A) **MHTC's Representative:** MoDOT's Human Resources Director is designated as MHTC's representative for the purpose of administering the provisions of the Agreement as defined in Paragraph (E) of this section. MHTC's representative may designate by written notice other persons having the authority to act on behalf of MHTC in furtherance of the performance of the Agreement. The Offeror shall fully coordinate its activities for MHTC with those of the Human Resources Director. As the work of the Offeror progresses, advice and information on matters covered by the Agreement shall be made available by the Offeror to the Human Resources Director throughout the effective period of the Agreement.
- (B) **Release to Public:** No material or reports prepared by the Offeror shall be released to the public without the prior consent of MHTC's representative.
- (C) **Assignment:** The Offeror shall not assign or delegate any interest, and shall not transfer any interest in the services to be provided (whether by assignment, delegation, or novation) without the prior written consent of MHTC's representative.
- (D) **Status as Independent Contractor:** The Offeror represents itself to be an independent contractor offering such services to the general public and shall not represent itself or its employees to be an employee of MHTC or MoDOT. Therefore, the Offeror shall assume all legal and financial responsibility for taxes, FICA, employee fringe benefits, workers' compensation, employee insurance, minimum wage requirements, overtime, or other such benefits or obligations.
- (E) **Components of Agreement:** The Agreement between MHTC and the Offeror shall consist of: the RFP and any written amendments thereto, the Standard Solicitation Provisions and the proposal submitted by the Offeror in the response to the RFP and the post-award contract agreement signed between the parties. However, MHTC reserves the right to clarify any relationship in writing and such written clarification shall govern in case of conflict with the applicable requirements stated in the RFP or the Offeror's proposal. The Offeror is cautioned that its proposal shall be subject to acceptance by MHTC without further clarification.
- (F) **Amendments:** Any change in the Agreement, whether by modification or supplementation, must be accompanied by a formal contract amendment signed and approved by the duly authorized representative of the Offeror and MHTC.

(G) MBE/WBE Participation Encouraged:

1. Offerors are encouraged to submit copies of their existing affirmative action programs, if any. Offerors are also encouraged to directly hire minorities and women as direct employees of the Offerors.
2. Offerors are encouraged to obtain minority business enterprise (MBE) and women business enterprise (WBE) participation in this work through the use of subcontractors, suppliers, joint ventures, or other arrangements that afford meaningful participation for M/WBEs. Offerors are encouraged to obtain 10% MBE and 5% WBE participation.
3. Regardless of which persons or firms, if any, that the Offeror may use as subcontractors or suppliers of goods or services for the services to be provided, the Offeror ultimately remains responsible and liable to MHTC for the complete, accurate and professional quality/performance of these services.

(H) Nondiscrimination: The Offeror shall comply with all state and federal statutes applicable to the Offeror relating to nondiscrimination, including, but not limited to, Chapter 213, RSMo; Title VI and Title VII of Civil Rights Act of 1964 as amended (42 U.S.C. Sections 2000d and 2000e, *et seq.*); and with any provision of the “Americans with Disabilities Act” (42 U.S.C. Section 12101, *et seq.*).

(I) Executive Order: The Offeror shall comply with all the provisions of Executive Order 07-13, issued by the Honorable Matt Blunt, Governor of Missouri, on the sixth (6th) day of March, 2007. This Executive Order, which promulgates the State of Missouri’s position to not tolerate persons who contract with the state engaging in or supporting illegal activities of employing individuals who are not eligible to work in the United States, is incorporated herein by reference and made a part of this Agreement.

1. By signing this Agreement, the Offeror hereby certifies that any employee of the Offeror assigned to perform services under the contract is eligible and authorized to work in the United States in compliance with federal law.
2. In the event the Offeror fails to comply with the provisions of the Executive Order 07-13, or in the event the Commission has reasonable cause to believe that the Offeror has knowingly employed individuals who are not eligible to work in the United States in violation of federal law, the Commission reserves the right to impose such contract sanctions as it may determine to be appropriate, including but not limited to contract cancellation, termination or suspension in whole or in part or both.

(J) Incorporation of Provisions: The Offeror shall include the provisions of Section (3), paragraph I of this Agreement in every subcontract. The Offeror shall take such action with respect to any subcontract as the Commission may direct as a means of enforcing such provisions, including sanctions for noncompliance.

- (K) **Non-employment of Unauthorized Aliens:** Pursuant to Section 285.530, RSMo., no business entity or employer shall knowingly employ, hire for employment, or continue to employ an unauthorized alien to perform work within the State of Missouri. As a condition for the award of any contract or grant in excess of five thousand dollars by the State or by any political subdivision of the State to a business entity, or for any business entity receiving a state-administered or subsidized tax credit, tax abatement, or loan from the state, the business entity shall:
1. By sworn affidavit and provision of documentation, affirm its enrollment and participation in a federal work authorization program with respect to the employees working in connection with the contracted services. E-Verify is an example of a federal work authorization program. The business entity must affirm its enrollment and participation in the E-Verify federal work authorization program with respect to the employees proposed to work in connection with the services requested herein by providing acceptable enrollment and participation documentation consisting of **completed** copy of the E-Verify Memorandum of Understanding (MOU). For business entities that are not already enrolled and participating in a federal work authorization program, E-Verify is available at http://www.dhs.gov/files/programs/gc_1185221678150.shtm.
 2. By sworn affidavit, affirm that it does not knowingly employ any person who is an unauthorized alien in connection with the contracted services. A copy of the affidavit referenced herein is provided within this document, attached as Exhibit G.
- (L) **Proof of Lawful Presence For Sole Proprietorships and Partnerships:** If the business entity is a sole proprietorship or partnership, pursuant to Section 208.009, RSMo., each sole proprietor and each general partner shall provide affirmative proof of lawful presence in the United States. Such sole proprietorship or partnership is eligible for temporary public benefits upon submission by each sole proprietor and general partner of a sworn affidavit of his/her lawful presence on the United States until such lawful presence is affirmatively determined, or as otherwise provided by Section 208.009, RSMo. A copy of the affidavit reference herein is provided within this document, attached as Exhibit H.
- (M) **Bankruptcy:** Upon filing for any bankruptcy or insolvency proceeding by or against the Offeror, whether voluntarily, or upon the appointment of a receiver, Offeror, or assignee, for the benefit of creditors, MHTC reserves the right and sole discretion to either cancel the Agreement or affirm the Agreement and hold the Offeror responsible for damages.
- (N) **Law of Missouri to Govern:** The Agreement shall be construed according to the laws of the state of Missouri. The Offeror shall comply with all local, state and federal laws and regulations relating to the performance of the Agreement.

- (O) **Cancellation:** MHTC may cancel the Agreement at any time by providing the Offeror with written notice of cancellation. Should MHTC exercise its right to cancel the Agreement for such reasons, cancellation will become effective upon the date specified in the notice of cancellation sent to the Offeror.
- (P) **Venue:** No action may be brought by either party concerning any matter, thing or dispute arising out of or relating to the terms, performance, nonperformance or otherwise of the Agreement except in the Circuit Court of Cole County, Missouri. The parties agree that the Agreement is entered into at Jefferson City, Missouri, and substantial elements of its performance will take place at or be delivered to Jefferson City, Missouri, by reason of which the Offeror consents to venue of any action against it in Cole County, Missouri.
- (Q) **Ownership of Reports:** All documents, reports, exhibits, etc. produced by the Offeror at the direction of MHTC's representative and information supplied by MHTC's representative shall remain the property of MHTC.
- (R) **Confidentiality:** The Offeror shall not disclose to third parties confidential factual matters provided by MHTC's representative except as may be required by statute, ordinance, or order of court, or as authorized by MHTC's representative. The Offeror shall notify MHTC immediately of any request for such information.
- (S) **Nonsolicitation:** The Offeror warrants that it has not employed or retained any company or person, other than a bona fide employee working for the Offeror, to solicit or secure the Agreement, and that it has not paid or agreed to pay any percentage, brokerage fee, gift, or any other consideration, contingent upon or resulting from the award or making of the Agreement. For breach or violation of this warranty, MHTC shall have the right to annul the Agreement without liability, or in its discretion, to deduct from the Agreement price or consideration, or otherwise recover the full amount of such fee, commission, percentage, brokerage fee, gift or contingent fee.
- (T) **Conflict of Interest:** The Offeror covenants that it presently has no actual conflict of interest or appearance of conflict of interest and shall not acquire any interest, directly or indirectly, which would conflict in any manner or degree with the performance of the services under this Agreement. The Offeror further covenants that no person having any such known interest shall be employed or conveyed an interest, directly or indirectly, in this Agreement.
- (U) **Maintain Papers:** The Offeror must maintain all working papers and records relating to the Agreement. These records must be made available at all reasonable times at no charge to MHTC and/or the Missouri State Auditor during the term of the Agreement and any extension thereof, and for three (3) years from the date of final payment made under the Agreement.
1. MHTC's representative shall have the right to reproduce and/or use any products derived from the Offeror's work without payment of any royalties, fees, etc.

2. MHTC's representative shall at all times have the right to audit any and all records pertaining to the services.

(V) **Indemnification:** Except to the extent of any willful misconduct or negligence on the part of the Commission or any persons receiving services hereunder, the Contractor shall be responsible for injury or damages to the extent arising from the negligence or willful misconduct of Contractor while providing services under the terms and conditions of this Agreement. In addition to the liability imposed upon the Contractor on the account of personal injury, bodily injury, including death or property damage, suffered as a result of the Contractor's negligent performance or willful misconduct under this Agreement, the Contractor assumes the obligation to save the Commission harmless, including its agents, employees and assigns, and to indemnify the Commission, including its agents, employees and assigns, from every expense, liability or payment to the extent the expenses liability or payment arise out of such wrongful or negligent act, including legal fees to except the extent caused by the willful misconduct or negligence of the Commission or any person receiving services hereunder. The Contractor also agrees to hold harmless the Commission, including its agents, employees and assigns, from any wrongful or negligent act or omission committed by any subcontractor or other person employed by or under the supervision of the Contractor for any purpose under this Agreement, and to indemnify the Commission, including its agents, employees and assigns, from every expense, liability or payment to the extent it arises out of such wrongful or negligent act or omission.

(W) **Insurance:**

- (1) Prior to contract signing, the Offeror may be asked about its ability to provide certificates of insurance which meet, or approach, the following coverages:

- | | |
|---|---|
| a. General Liability | Not less than \$500,000 for any one person in a single accident or occurrence, and not less than \$3,000,000 for all claims arising out of a single occurrence; |
| b. Automobile Liability | Not less than \$500,000 for any one person in a single accident or occurrence, and not less than \$3,000,000 for all claims arising out of a single occurrence; |
| c. Missouri State Workmen's Compensation policy or equivalent in accordance with state law. | |

(X) **Extension:** The contract shall not bind, not purport to bind, MHTC for any contractual commitment in excess of the original contract period. The MHTC shall have the right, at its sole option, to extend the contract for two (2) one-year periods, or a portion thereof. In the event that MHTC exercises its options, all terms, conditions, and provisions of the original contract shall remain the same and apply during the extension

period. If the options are exercised, the contractor shall agree that the prices stated in the original contract shall not be increased in excess of the maximum percentage of increases, if any, stated on the pricing page of the contract. Any percentages of increase shall be computed against the original contract price for each extension period. If the pricing page does not include such percentages or if applicable spaces are left blank, or not completed, prices during extension periods shall be the same as during the original contract period. The MHTC does not automatically exercise its options based upon the maximum percentage of increase without documented justification supporting an increase and reserves the right to offer or to request an extension of the contract at a price less than that price derived from the contractor's extension percentages, if any.

- (Y) **Invoices:** All invoices must be submitted on a monthly basis by the Firm to MHTC's representative. The invoices must be properly itemized. Those charges pertaining to consulting services should provide detail as to the person performing the task, number of hours worked, time period, and the specified task. All expenses relating to the transfer of a MoDOT employee must identify the employee for which the expense applies. Those relocation expenses that are paid by the Firm and reimbursed by MoDOT should be properly identified and accounted for on the invoice. Adequate supporting documentation in the form of invoices, settlement statements, etc. must be included in order to be reimbursed.

**SECTION (4):
PROPOSAL SUBMISSION INFORMATION**

(A) SUBMISSION OF PROPOSALS

- 1. Pricing and Signature:** Proposals should be priced, signed and returned (with necessary attachments) to Ms. Leann Kottwitz as provided in this RFP. Specifically, any form containing a signature line in this RFP and any amendments, pricing pages, etc., should be manually signed and returned as part of the proposal.
- 2. Submission of All Data Required:** The Offeror must respond to this RFP by submitting all data required in paragraph (B) below for its proposal to be evaluated and considered for award. Failure to submit such data shall be deemed sufficient cause for disqualification of a proposal from further consideration.
- 3. Public Inspection:** The Offeror is hereby advised that all proposals and the information contained in or related thereto shall be open to public inspection and that MHTC does not guarantee nor assume any responsibility whatsoever in the event that such information is used or copied by individual person(s) or organization. Therefore, the Offeror must submit its proposal based on such conditions without reservations.
- 4. Clarification of Requirements:** Any and all questions regarding specifications, requirements, competitive procurement process, or other questions must be directed to Ms. Leann Kottwitz, Missouri Department of Transportation, P. O. Box 270, Jefferson City, Missouri, 65102, (573) 751-3685 or email at leann.kottwitz@modot.mo.gov. All written questions must be addressed to Leann Kottwitz no later than **10:00 a.m., local time, August 19, 2013**. Once all the questions are gathered, MoDOT will issue an addendum and post the responses to all questions on-line for vendors to retrieve. Responses to the questions will be posted on MoDOT's website at: http://www.modot.org/business/contractor_resources/Commodities.htm in the form of a written addendum. **It is anticipated this addendum will be issued on August 23, 2013. It is the sole responsibility of the Offeror to check for any and all addendums throughout the RFP process.**
- 5. RFP Schedule Of Events:** The following RFP Schedule of Events represents MoDOT's best estimate of the schedule that shall be followed. Unless otherwise specified, the time of day for the following events shall be between 7:30 am and 3:30 pm, Local Time.

MoDOT reserves the right at its sole discretion to expand this schedule, as it deems necessary, without any notification except for the deadline date for submitting a proposal.

Event	Date	Time
MoDOT Issues RFP	August 5, 2013	3:30 p.m. (Local Time)
Deadline for Written Comments	August 19, 2013	10:00 a.m.
Deadline for MoDOT Issuing Responses to Written Comments	August 23, 2013	3:30 p.m.
Deadline for Submitting a Proposal	September 10, 2013	2:00 p.m.
Recommendation of Award	September 30, 2013	3:30 p.m.
Contract Effective Date	January 1, 2014	8:00 a.m.

- 6. Oral Presentations:** An oral presentation by an Offeror to clarify a proposal may be required at the sole discretion of MoDOT. The contract may be awarded without any discussion with the Offeror. Oral presentations will be made at the Offerors expense.

(B) REQUIRED ELEMENTS OF PROPOSAL

- 1. Experience.** The proposal must clearly identify the Offeror's experience in offering the services requested in this RFP. The description should include a list of the agencies, which your institution has served or currently serves.
- 2. Personnel.** Please indicate the name, location, telephone number, fax number and email address of the primary contact person for the Offeror. Information presented in this section should highlight the previous Offeror experience, as well as any work with other state agencies or local governments in Missouri. Offeror must furnish a complete listing of each sub-Offeror, if any, and complete contact information for that sub-Offeror.
- 3. References.** Proposals should indicate the name, title and telephone number of at least three officials of clients within the past three years.

(C) EVALUATION CRITERIA AND PROCESS

Evaluation Factors: Any agreement for services resulting from this RFP shall be awarded to the Offeror providing the best proposal to MHTC. After determining responsiveness, proposals will be evaluated in accordance with the following criteria:

- | | |
|---|-----------------|
| a. Experience, Expertise and Reliability; | 40 pts. Maximum |
| b. Proposed Method of Performance | 30 pts. Maximum |
| c. Pricing | 30 pts. Maximum |

- 1. Experience, Expertise and Reliability:** Experience, expertise and reliability of the Offeror's organization is considered in the evaluation process. Therefore, the Offeror is advised to submit any information, which documents successful and reliable experience in past performances, *i.e. past customer service evaluations*.
 - a. The qualifications (expertise) of the personnel proposed by the Offeror to perform the requirements of the RFP will be considered in the evaluation. Therefore, the Offeror should submit detailed information related to the expertise and qualification of the staff proposed.
 - b. The Offeror should provide whether or not your company is owned by a parent company. Additionally, provide the most recent annual report of your company and/or parent company.
 - c. The Offeror should describe the nature of any existing strategic partnerships or alliances with other companies involved in relocation management services.
 - d. The Offeror should provide a list of the three largest clients your company has gained or lost during the last 12 months.

- e. The Offeror should provide two “former” client references which you had provided relocation services during past two years, but are no longer providing such services.
- f. The Offeror should explain if your company or an affiliate ever filed for bankruptcy.
- g. The Offeror should provide a resume including references, education, qualifications and previous work assignments as they may relate to this RFP for key personnel to be assigned to the project.
- h. If the staff is not yet hired, the Offeror should provide:
 - i. Detailed descriptions of the required employment qualifications, and
 - ii. Detailed job descriptions of the positions to be filled, including the type of individuals proposed to be hired.

2. Proposed Method of Performance: Proposals will be evaluated based on the Offeror’s distinctive plan for performing the requirements of the RFP.

- a. The Offeror should present a written narrative that demonstrates the method or manner in which the Offeror proposes to satisfy the requirements of the Scope of Work.
- b. The method by which the proposed method of performance is written is left to the discretion of the Offeror. However, please respond to all concerns.

The Offeror should provide an organizational chart showing the staffing and line of authority for key professional staff and administrative personnel to be used in performing the proposed work. The relationship of the project leader to management and to support personnel should be clearly illustrated.

The Offeror may also present a written narrative that demonstrates the method or manner in which the Offeror proposes to provide any Optional Services.

- c. Relocation Services
 - i. The Offeror should describe how you would counsel employees about specific policies.
 - ii. The Offeror should describe the selection and management of real estate brokers.
 - iii. The Offeror should describe your relocation accounting services including auditing, approving and paying employee relocation expenses.

- iv. The Offeror should describe the process on reporting relocation expense activity.
- v. The Offeror should describe how you would integrate the disbursement process with billing, payroll reporting and management reporting.
- vi. The Offeror should identify how technology supports your relocation accounting services.

d. BVO/Home Sale

- i. The Offeror should describe how you propose to deliver BVO and related departure services, including fees for services and carrying costs.
- ii. The Offeror should describe your property evaluation process.
- iii. The Offeror should describe your strategies for maximizing employees success in generating a sale of the home to a buyer.
- iv. The Offeror should describe your inventory management process and any special systems to control costs.
- v. The Offeror should describe what additional fees, if any, are charged if a referral fee from a realtor is not received.
- vi. The Offeror should describe any programs, which will allow for direct billing of closing costs up front for the transferee/employee.
- vii. The Offeror should describe process for reviewing prospective buyer's loan approval qualifications to ensure against a BVO fallthrough.
- viii. Fees for employee, should they withdraw from BVO process.

e. HHG Moves

- i. The Offeror should explain if they use an exclusive company for moving household goods and/or list all moving household goods companies that they use.
- ii. The Offeror should describe if all the companies they use have active common carrier authority with the Motor Carriers Division of the Missouri Department of Transportation.
- iii. The Offeror should describe if the moving household goods companies they use are bonded and insured.

- iv. The Offeror should explain the mark-up percent for moving household goods.
- v. The Offeror should describe the storage arrangements for household goods.

f. Service Delivery

- i. The Offeror should describe their commitment to employee callback time.
- ii. The Offeror should describe what rewards or incentives are in place to provide for top performing employees at their company.
- iii. The Offeror should describe historically, what the turnover rate for your customer service teams, which service accounts.

g. Technology and Reporting

- i. The Offeror should describe their capabilities regarding reporting. Additionally, the Offeror should explain if they have on-line system that could be used by our department, if so describe what the systems are, their capabilities and the cost that would be involved.
- ii. The Offeror should explain what controls are in place to protect data and confidentiality of the data.

h. Transition Plan

- i. The Offeror should describe specific steps your company will take to ensure that the assumption of this account will be handled in an efficient manner.
- ii. The Offeror should describe the transition plan/process their company uses when taking over management of a new account.
- iii. The Offeror should describe their transition plan for the employees that are currently in the process of relocating.

- 3. Pricing:** The objective evaluation of cost shall be conducted based upon the pricing listed on the Pricing Page. Cost points shall be awarded using a scale of 30 possible points and the following formula. Of the 30 points the cost calculation shall be:

Buyer Value Option Services- *20 point maximum*
 Management of Household Goods Transportation -*5 point maximum*
 Home Marketing Assistance – *5 point maximum*

$$\frac{\text{Lowest Responsive Price}}{\text{Compared Price}} \times 30 = \text{Cost Points}$$

4. **Historic Information:** MHTC reserves the right to consider historic information and facts, whether gained from the Offeror's proposal, question and answer conferences, references, or other sources, in the evaluation process.
5. **Responsibility to Submit Information:** The Offeror is cautioned that it is the Offeror's sole responsibility to submit information related to the evaluation categories and that MHTC's representative is under no obligation to solicit such information if it is not included with the Offeror's proposal. Failure of the Offeror to submit such information may cause an adverse impact on the evaluation of the Offeror's proposal.

(D) PRICING

1. **Fee Schedule:** The Offeror must submit a proposed fee for all services defined in the Scope of Work. This fee must be shown on Section (5), Price Page, of this proposal, which must be completed, signed and returned with the Offeror's proposal.

**SECTION (5):
PRICE PAGE**

(A) FEE SCHEDULE: The Offeror shall indicate below all fees for providing services in accordance with the provisions and requirements stated in the RFP: Also indicate the unit for which this fee will be applied. Example: Per move, per year, etc.

Buyer Value Option Services	\$_____	Fee for service
Management of Household Goods Transportation	\$_____	Fee for service
Home Marketing Services	\$_____	Fee for service
Carrying Costs	\$_____	
Other_____	\$_____	
Optional Services Offered by Firm		
_____	_____	Fee for service
_____	_____	Fee for service
_____	_____	Fee for service
_____	_____	Fee for service
_____	_____	Fee for service

In the event that MHTC exercises its options to renew the contract for two (2) additional one-year periods pursuant to the applicable provisions in Section 3 of this document, the Firm should provide below the maximum percentage of increase or minimum percentages of decrease for each renewal period. The Firm is cautioned that the percentages shall be computed against the ORIGINAL contract price for each renewal period. If the following blanks are not complete, prices during renewal periods shall be the same as during the original contract period. Furthermore, the Firm is advised that MHTC does not automatically grant increases at the time of renewing the contract and that if an increase is requested, documentation of need must be provided at the time of renewal.

First Renewal Period	_____	% of maximum increase and/or
	_____	% of minimum decrease
Second Renewal Period	_____	% of maximum increase and/or
	_____	% of minimum decrease

Signature of Offerors Authorized Representative

Date Signed