



# VCU

## Procurement Services

March 8, 2023

Kevin Wall  
JLL  
2020 K Street NW, Suite 1100  
Washington, DC 20006

Procurement Services  
912 W. Grace Street, 5<sup>th</sup> Floor  
Richmond, VA 23284

804 828-1077  
Fax: 804 828-7837  
[www.vcu.edu/procurement](http://www.vcu.edu/procurement)

RE: Contract #: 7608269JK-3  
Renewal #: Contract Extension

Mr. Wall,

Your firm's contract with Virginia Commonwealth University (VCU) for **Move Management Services** expires on **June 30, 2023**. VCU intends to extend this contract for the period of July 1, 2023 through February 29, 2024, after which the contract shall terminate.

Your signature constitutes your firm's acceptance of this extension, to include the optional use language requirement provision below.

### OPTIONAL USE CONTRACT

This contract is an optional use, requirements-based contract. VCU is in no way required to make purchases from the Contractor, and may in its sole discretion, purchase the identical and / or similar goods / services from other sources.

Pricing remains the same as the previous contract period.

By signing and submitting this contract extension letter, Contractor certifies that it will maintain the insurance coverages required at the time the contract was awarded. At renewal, Contractor shall have a new Certificate of Insurance listing VCU as the "Additional Insured", citing the contractor's name and contract number, mailed to VCU Risk Management, P.O. Box 843040, Richmond, VA 23284.

Please return this executed document to me as soon as possible. Your response and any questions pertaining to this letter may be emailed to me at [sfclark@vcu.edu](mailto:sfclark@vcu.edu).

Sincerely,

*Susan Lewis*

Susan Lewis, VCCO  
Senior Buyer

Contract #: 7608269JK-3 Move Management Services

**RESPONSE**

Jones Lang LaSalle Americas, Inc.

Name of Firm



Signature

Heather Newhart

Name Printed

Senior Vice President

Title

03/09/2023

Date



# VCU

## Procurement Services

November 16, 2022

Kevin Wall  
JLL  
2020 K Street NW, Suite 1100  
Washington, DC 20006

RE: Contract #: 7608269JK-3  
Renewal #: Contract Extension through June 30, 2023

Mr. Wall,

Your firm's contract with Virginia Commonwealth University (VCU) for **Move Management Services** expires on **February 1, 2023**. VCU intends to extend this contract for the period of February 2, 2023 through June 30, 2023, after which the contract shall terminate.

Your signature constitutes your firm's acceptance of this extension, to include the optional use language requirement provision below.

### OPTIONAL USE CONTRACT

This contract is an optional use, requirements-based contract. VCU is in no way required to make purchases from the Contractor, and may in its sole discretion, purchase the identical and / or similar goods / services from other sources.

Pricing remains the same as the previous contract period.

By signing and submitting this contract extension letter, Contractor certifies that it will maintain the insurance coverages required at the time the contract was awarded. At renewal, Contractor shall have a new Certificate of Insurance listing VCU as the "Additional Insured", citing the contractor's name and contract number, mailed to VCU Risk Management, P.O. Box 843040, Richmond, VA 23284.

Please return this executed document to me as soon as possible. Your response and any questions pertaining to this letter may be emailed to me at [tlhall2@vcu.edu](mailto:tlhall2@vcu.edu).

Sincerely,

Teresa Hall, VCA, VCO, VCCO, CUPO  
Facilities Procurement Category Manager

Procurement Services  
912 W. Grace Street, 5<sup>th</sup> Floor  
Richmond, VA 23284

804 828-1077  
Fax: 804 828-7837  
[www.vcu.edu/procurement](http://www.vcu.edu/procurement)

Contract #: 7608269JK-3 Move Management Services

**RESPONSE**

Jones Lang LaSalle Americas, Inc.

Name of Firm



Signature

Heather Newhart

Name Printed

Senior Vice President

Title

11/16/2022

Date



# VCU

## Procurement Services

January 24, 2021

Kevin Wall  
Jones Lang LaSalle Americas, Inc.  
1801 K Street NW, Suite 1000  
Washington, DC 20006

RE: Contract #: 7608269JK-3  
Renewal No.: Four of Four available

Mr. Wall,

Your firm's contract with Virginia Commonwealth University (VCU) for **Move Management Services** expires on **2/1/2022**. VCU intends to exercise the renewal of this contract in accordance with the terms and conditions of contract 7608269JK-3.

Services shall be provided for renewal period: 2/2/2022 through 2/1/2023.

Your signature constitutes your firm's acceptance of this renewal, to include the optional-use language requirement provision below.

### **OPTIONAL USE CONTRACT:**

This contract is an optional use, requirements based contract. VCU is in no way required to make purchases from the Contractor and may, in its sole discretion, purchase the identical and/or similar goods/services from other sources. Any estimates/quantities on a purchase order issued against this contract do not represent a purchase commitment by VCU.

\_\_\_\_\_ Pricing remains the same as the previous contract period.

\_\_\_\_\_ By signing and submitting this contract renewal letter Contractor certifies that it will maintain the insurance coverages required at the time the contract was awarded. At renewal, Contractor shall have a new Certificate of Insurance listing VCU as the "Additional Insured", citing the contractor's name and contract number, mailed to VCU Risk Management, P.O. Box 843040, Richmond, VA, 23284.

Please return this document to me as soon as possible. Your response may be emailed to me at [tlhall2@vcu.edu](mailto:tlhall2@vcu.edu). If you have any questions, please contact me at (804) 828-3409.

Sincerely,  
Teresa L. Hall, CUPO, VCA, VCO, VCCO  
Senior Buyer

Procurement Services  
912 W. Grace Street, 5<sup>th</sup> Floor  
Richmond, VA 23284

804 828-1077  
Fax: 804 828-7837  
[www.vcu.edu/procurement](http://www.vcu.edu/procurement)

Contract #: : 7608269JK-3 Move Management Services

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**RESPONSE:**

Jones Lang LaSalle Americas, Inc.

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Name of Firm

*KJ Wall*

---

Signature

Kevin J. Wall

---

Name Printed

VP Account Lead

---

Title

1/24/2022

---

Date



# VCU

## Procurement Services

January 6, 2021

Kevin Wall  
Jones Lang LaSalle Americas, Inc.  
1801 K Street NW, Suite 1000  
Washington, DC 20006

RE: Contract #: 7608269JK-3  
Renewal No.: Three of Four available

Mr. Wall,

Your firm's contract with Virginia Commonwealth University (VCU) for **Move Management Services** expires on **2/1/2021**. VCU intends to exercise the renewal of this contract in accordance with the terms and conditions of contract 7608269JK-3.

Services shall be provided for renewal period: 2/2/2021 through 2/1/2022.

Your signature constitutes your firm's acceptance of this renewal, to include the optional-use language requirement provision below.

**OPTIONAL USE CONTRACT:**

This contract is an optional use, requirements based contract. VCU is in no way required to make purchases from the Contractor and may, in its sole discretion, purchase the identical and/or similar goods/services from other sources. Any estimates/quantities on a purchase order issued against this contract do not represent a purchase commitment by VCU.

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Please return this document to me as soon as possible. Your response may be emailed to me at [thall2@vcu.edu](mailto:thall2@vcu.edu). If you have any questions, please contact me at (804) 828-3409.

Sincerely,  
Teresa L. Hall, CUPO, VCA, VCO, VCCO  
Senior Buyer

Procurement Services  
912 W. Grace Street, 5<sup>th</sup> Floor  
Richmond, VA 23284

804 828-1077  
Fax: 804 828-7837  
[www.vcu.edu/procurement](http://www.vcu.edu/procurement)

Contract #: : 7608269JK-3 Move Management Services

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**RESPONSE:**

Jones Lang LaSalle Americas Inc.

Name of Firm

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*KJ Wall*

Signature

---

Kevin Wall

Name Printed

---

Title

---

1/6/2021

Date

---





# VCU

## Procurement Services

January 8, 2020

Procurement Services  
912 W. Grace Street, 5<sup>th</sup> Floor  
Richmond, VA 23284

804 828-1077  
Fax: 804 828-7837  
[www.vcu.edu/procurement](http://www.vcu.edu/procurement)

Ilana Breslaw  
Jones Lang LaSalle Americas, Inc.  
1801 K Street NW, Suite 1000  
Washington, DC 20006

RE: Contract #: 7608269JK-3  
Renewal No.: Two of Four available

Ms. Breslaw,

Your firm's contract with Virginia Commonwealth University (VCU) for **Move Management Services** expires on **2/1/2020**. VCU intends to exercise the renewal of this contract in accordance with the terms and conditions of contract 7608269JK-3.


Services shall be provided for renewal period: 2/2/2020 through 2/1/2021.

Your signature constitutes your firm's acceptance of this renewal, to include the optional-use language requirement provision below.

**OPTIONAL USE CONTRACT:**

This contract is an optional use, requirements based contract. VCU is in no way required to make purchases from the Contractor and may, in its sole discretion, purchase the identical and/or similar goods/services from other sources. Any estimates/quantities on a purchase order issued against this contract do not represent a purchase commitment by VCU.

 Pricing remains the same as the previous contract period.

 By signing and submitting this contract renewal letter Contractor certifies that it will maintain the insurance coverages required at the time the contract was awarded. At renewal, Contractor shall have a new Certificate of Insurance listing VCU as the "Additional Insured", citing the contractor's name and contract number, mailed to VCU Risk Management, P.O. Box 843040, Richmond, VA, 23284.

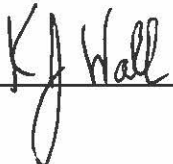
Please return this document to me as soon as possible. Your response may be emailed to me at [tlhall2@vcu.edu](mailto:tlhall2@vcu.edu). If you have any questions, please contact me at (804) 828-3409.

Sincerely,  
Teresa L. Hall, CUPO, VCO, VCCO  
Senior Buyer

Contract # : 7608269JK-3 Move Management Services

**RESPONSE:**

Jones Lang LaSalle Americas, Inc.  
Name of Firm

  
Signature

Kevin J. Wall  
Name Printed

VP, Account Lead  
Title

January 13, 2020  
Date



# VCU

## Procurement Services

December 3, 2018

Procurement Services  
912 W. Grace Street, 5<sup>th</sup> Floor  
Richmond, VA 23284

804 828-1077  
Fax: 804 828-7837  
[www.vcu.edu/procurement](http://www.vcu.edu/procurement)

Ilana Breslaw  
Jones Lang LaSalle Americas, Inc.  
1801 K Street NW, Suite 1000  
Washington, DC 20006

RE: Contract #: 7608269JK-3  
Renewal No.: One of Four available

Ms Breslaw,

Your firm's contract with Virginia Commonwealth University (VCU) for **Move Management Services** expires on **2/1/2019**. VCU intends to exercise the renewal of this contract in accordance with the terms and conditions of contract 7608269JK-3.

Services shall be provided for renewal period: 2/2/2019 through 2/1/2020.

Your signature constitutes your firm's acceptance of this renewal, to include the optional-use language requirement provision below.

### **OPTIONAL USE CONTRACT:**

This contract is an optional use, requirements based contract. VCU is in no way required to make purchases from the Contractor and may, in its sole discretion, purchase the identical and/or similar goods/services from other sources. Any estimates/quantities on a purchase order issued against this contract do not represent a purchase commitment by VCU.

Pricing remains the same as the previous contract period.

By signing and submitting this contract renewal letter Contractor certifies that it will maintain the insurance coverages required at the time the contract was awarded. At renewal, Contractor shall have a new Certificate of Insurance listing VCU as the "Additional Insured", citing the contractor's name and contract number, mailed to VCU Risk Management, P.O. Box 843040, Richmond, VA, 23284.

Please return this document to me as soon as possible. Your response may be emailed to me at [tlhall2@vcu.edu](mailto:tlhall2@vcu.edu). If you have any questions, please contact me at (804) 828-3409.

Sincerely,  
Teresa L. Hall, VCO, CUPO  
Senior Buyer

Contract #: 7608269JK-3 Move Management Services

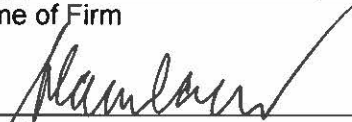
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**RESPONSE:**

Jones Lang LaSalle Americas, Inc

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Name of Firm

  
Signature

---

Ilana Breslaw

---

Name Printed

VP / Sr Variable Resource Team Lead

---

Title

12/5/18

---

Date



**VCU**

Procurement Services

**Commonwealth of Virginia  
Standard Contract**

Contract Number: 7608269JK-3

This optional use contract entered into on February 2, 2018 by Jones Lang LaSalle Americas, Inc. hereinafter called the "Contractor" and Commonwealth of Virginia, Virginia Commonwealth University, called the "Purchasing Agency".

WITNESSETH that the Contractor and the Purchasing Agency, in consideration of the mutual covenants, promises and agreements herein contained, agree as follows:

**PERIOD OF THE PERFORMANCE:** From February 2, 2018 through February 1, 2019 with four (4) successive one (1) year renewal options, to be exercised upon written agreement of both parties.

**SCOPE OF CONTRACT:** The Contractor shall provide the goods/services to the Purchasing Agency as set forth in the Contract Documents.

The contract documents shall consist of:

- (1) This signed form
- (2) The RFP 7608269JK dated September 5, 2017 including Addendum Number One dated 9/22/2017 and Addendum Number Two dated 11/30/2017
- (3) The Contractors Proposal dated 9/28/17, the negotiated pricing Modifications and the Contractors revised Appendix III dated 2/2/2018, incorporated herein:
  - (a) Negotiations Summary, dated January 3, 2018
  - (b) Appendix III, dated February 2, 2018

Any conflict or inconsistency between the provisions of this document and any other documents that are attached hereto as part of this Agreement shall be resolved by giving precedence in the following order:

- (1) This signed form
- (2) The RFP 7608269JK dated September 5, 2017 including Addendum Number One dated 9/22/2017 and Addendum Number Two dated 11/30/2017
- (3) The Contractors Proposal dated 9/28/17, the negotiated pricing Modifications and the Contractors revised Appendix III dated 2/2/2018, incorporated herein:
  - (a) Negotiations Summary, dated January 3, 2018
  - (b) Appendix III, dated February 2, 2018



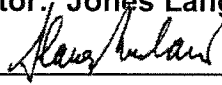
**VCU**

Procurement Services

**ENTIRE AGREEMENT:** This agreement constitutes the entire understanding of the parties and supersedes all prior oral or written agreements.

IN WITNESS WHEREOF, the parties have caused this Contract to be duly executed intending to be bound thereby.

**Contractor: Jones Lang LaSalle Americas, Inc.**

By: 

Name Printed: Ilana Breslaw

Date: 2/5/2018

Title: Vice President | Sr. Variable Team Lead

**Purchasing Agency: Virginia Commonwealth University**

By: 

Name Printed: Karol Kain Gray

Date: 2/6/18

Title: VP for Finance and Budget



**VCU**

Procurement Services

## Negotiations Summary

1/3/2018

### Pricing Modifications for Jones Lang LaSalle Americas, Inc. and Contract 7608269JK

Contractor has agreed to the following Negotiated Pricing Schedule for the Purchasing Agency:

<b>Relocation Management Services</b>	<b>Hourly Rate</b>
Senior Move/Project Manager	\$113.50
Move/Project Manager	\$99.80
Move/Project Manager Assistant/Associate	\$90.70
Interior Designer	\$99.80

Note the hourly rate is to include all cost (including but not limited to supervision, office supplies, transportation, miscellaneous and incidentals)

These rates are based on negotiated services between the Purchasing Agency and the Contractor. During negotiations the Purchasing Agency was able to receive a lower rate based on the location of the Contractors proposed team in regards to anticipated service locations from the Purchasing Agency in the Richmond, VA area.



**VCU**

Procurement Services

The Contractor has agreed to the following pricing schedule for other VASCUPP Members (outside the Richmond, VA area).

<b>Relocation Management Services</b>	<b>Hourly Rate</b>
Senior Move/Project Manager	\$120.00
Move/Project Manager	\$105.00
Move/Project Manager Assistant/Associate	\$92.00
Interior Designer	\$102.00

Note the hourly rate is to include all cost (including but not limited to supervision, office supplies, transportation, miscellaneous and incidentals)





**VCU**

Procurement Services

## Appendix III (revised)

2/2/2018

### Appendix III (Revised 2-2-2018)

#### Exceptions:

JLL respectfully asks VCU to consider making the following modifications to the contract:

#### XIII. Special Terms and Conditions.

U.WARRANTY (COMMERCIAL): ~~The Contractor agrees that the supplies or services furnished under any award resulting from this solicitation shall be covered by the most favorable commercial warranties the Contractor gives any customer for such supplies or services and that the rights and remedies provided therein are in addition to and do not limit those available to the Commonwealth by any other clause of this solicitation. A copy of this warranty must be furnished with the proposal. Contractor warrants that services will be performed in accordance with the Contract in a good and workmanlike manner, consistent with customary business practices. To the extent permissible, warranties for supplies that are afforded to the Contractor will be transferred in their entirety to the Commonwealth.~~



**VCU**

Procurement Services

# Request for Proposals

RFP #: 7608269JK

RFP Title #: Relocation Management Services

Issuing Agency: Virginia Commonwealth  
University

Issue Date: 9/5/2017

Closing Date: 9/29/2017 at 3:00 PM



A VASCUPP Member Institution

**Request for Proposals RFP #7608269JK**

**Issue Date:** 8/18/2017

**Title:** Relocation Management Services

**Send all Proposals To:** Virginia Commonwealth University  
RFP # 7608269JK  
Attention: John Kostyniuk  
912 W Grace St, 5th floor  
Richmond, Virginia 23284-0327

**Proposals Shall Be Received Until:** 9/29/2017 at 3:00 PM.

**Direct ALL inquiries concerning this RFP to:** John Kostyniuk, Procurement Manager (Construction, A and E, and Facilities) [kostyniukjs@vcu.edu](mailto:kostyniukjs@vcu.edu)

**Questions concerning this RFP must be received via email no later than:** 9/20/2017 @ 3:00PM

This Request for Proposals & any Addenda are posted on the eVA website at: <http://www.eva.virginia.gov>

HARD-COPY, ORIGINAL PROPOSALS MUST BE RECEIVED IN VIRGINIA COMMONWEALTH UNIVERSITY'S DEPARTMENT OF PROCUREMENT SERVICES ON OR BEFORE THE DATE AND TIME DESIGNATED ON THIS SOLICITATION. ELECTRONIC SUBMISSIONS AND FACSIMILE SUBMISSIONS WILL NOT BE ACCEPTED IN LIEU OF THE HARD-COPY, ORIGINAL PROPOSAL. VENDORS ARE RESPONSIBLE FOR THE DELIVERY OF THEIR PROPOSAL. PROPOSALS RECEIVED AFTER THE OFFICIAL DATE AND TIME WILL BE REJECTED. THE OFFICIAL DATE AND TIME USED IN RECEIPT OF RESPONSES IS THAT TIME ON THE CLOCK OR AUTOMATIC TIME STAMP IN THE DEPARTMENT OF PROCUREMENT SERVICES.

**IF PROPOSALS ARE HAND DELIVERED OR SENT BY FEDEX, UPS, OR ANY OTHER PRIVATE COURIER, DELIVER TO THE ADDRESS NOTED ABOVE: VIRGINIA COMMONWEALTH UNIVERSITY, RFP # 7635588JK, ATTENTION: John Kostyniuk, 912 W. GRACE ST., 5<sup>TH</sup> FLOOR, RICHMOND, VA 23284-0327. US MAIL IS NOT RECOMMENDED.**

THE RFP NUMBER, DATE AND TIME OF PROPOSAL SUBMISSION DEADLINE, AS REFLECTED ABOVE, MUST CLEARLY APPEAR ON THE FACE OF YOUR PROPOSAL PACKAGE

In Compliance With This Request for Proposals And To All Conditions Imposed Therein and Hereby Incorporated By Reference, The Undersigned Offers And Agrees To Furnish The Goods/Services Described Herein In Accordance With The Attached Signed Proposal Or As Mutually Agreed Upon By Subsequent Negotiation. Furthermore, The Undersigned Agrees Not To Start Any Work Relative To This Particular Solicitation Until A Resulting Formal Signed Purchase Order Is Received By The Contractor From University's Department of Procurement Services. Any Work Relative To This Request for Proposals Performed By The Contractor Prior To Receiving A Formal Signed Purchase Order Shall Be At The Contractor's Own Risk And Shall Not Be Subject To Reimbursement By The University. **Signature below constitutes acknowledgement of all information contained through links referenced herein.**

**NAME AND ADDRESS OF COMPANY:**

_____	Date: _____
_____	By (Signature In Ink): _____
_____ Zip Code _____	Name Typed: _____
E-Mail Address: _____	Title: _____
Telephone: ( ) _____	Fax Number: ( ) _____
<b>Toll free, if available</b>	<b>Toll free, if available</b>
DUNS NO.: _____	FEI/FIN NO.: _____

REGISTERED WITH eVA: ( ) YES ( ) NO	SMALL BUSINESS: ( ) YES ( ) NO
VIRGINIA DSBSD ( ) YES ( ) NO	MINORITY-OWNED: ( ) YES ( ) NO
DSBSD CERTIFICATION #: _____	WOMEN-OWNED: ( ) YES ( ) NO

**A Pre-Proposal conference will be held. See Section V herein.**

**THIS SOLICITATION CONTAINS 43 PAGES**

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## **I. PURPOSE:**

This RFP sets forth the minimum performance criteria. The intent and purpose of this Request for Proposals (RFP) is to establish a contract with qualified source(s) to provide “as-needed” move management services for a variety of projects ranging from small renovations to major capital projects including new construction at Virginia Commonwealth University (the lead issuing institution and hereafter referred to as “the University” or “VCU”), an agency of the Commonwealth of Virginia.

Period of contract: The initial contract term is one (1) year with the option to renew the contract for four (4) additional, consecutive one (1) year terms.

It is the intent of this solicitation and resulting contract(s) to allow for cooperative procurement. Accordingly, any public body, public or private health or educational institution or lead-issuing institution's affiliated foundations may access any resulting contract(s) if authorized by the contractor. Additional information is available at: *RFP Website Link Cooperative Procurement* (<http://go.vcu.edu/procurement-purchasing>)

## **II. GOVERNING RULES:**

This solicitation is issued in accordance with the provisions of:

The provisions of the purchasing manual for institutions of higher education and their vendors: <https://vascupp.org/hem.pdf>

Rules Governing Procurement of Goods, Services, Insurance, and Construction by a Public Institution of Higher Education of the Commonwealth of Virginia:  
<https://vascupp.org/rules.pdf>

## **III. OPTIONAL USE CONTRACT:**

The resulting contract(s) will be an optional use contract. VCU is in no way required to make purchases from the Contractor and may in its sole discretion purchase the identical and/or similar goods/services from other sources. Any estimates/quantities contained herein do not represent a purchase commitment by VCU.

## **IV. THE UNIVERSITY:**

Information is available at:

[http://documents.procurement.vcu.edu/purchasing/pdf\\_docs/forms/RFP\\_Website\\_Link\\_The\\_University.pdf](http://documents.procurement.vcu.edu/purchasing/pdf_docs/forms/RFP_Website_Link_The_University.pdf)

## **V. PRE-PROPOSAL CONFERENCE:**

An optional pre-proposal conference will be held at 2:30 PM (EST) on 9/14/2017 at VCU at 700 W. Grace Street, Richmond, VA, in the first floor conference room. The purpose of this conference is to allow potential offerors an opportunity to present questions and obtain clarification relative to any facet of this solicitation.

**For directions and paid parking information visit:**

<http://business.vcu.edu/about-the-school/our-location/directions--parking/>

*Note: Offerors should submit questions (via email) to John Kostyniuk at [kostyniukjs@vcu.edu](mailto:kostyniukjs@vcu.edu) at least (3) business days prior to the date of the conference; and if attending in person, should advise regarding the number of representatives.*

While attendance at this conference will not be a prerequisite to submitting a proposal, Offerors who intend to submit a proposal are encouraged to attend. Bring a copy of the solicitation with you. Any changes resulting from this conference will be issued in a written Addendum to the solicitation.

Offerors may participate in the pre-proposal conference via conference call by using the following dial in numbers:

- 866-842-5779 (United States and Canada),
- Conference Code Number: 8291055716, Enter when prompted followed by the # sign

Note: Offerors who participate in the pre-proposal conference via conference call shall submit an email to John Kostyniuk at [kostyniukjs@vcu.edu](mailto:kostyniukjs@vcu.edu) at least one (1) business day prior to the pre-proposal conference, confirming the Offerors participation and contact information.

## **VI. STATEMENT OF NEEDS:**

VCU requires the qualified source to provide move management services for a variety of projects ranging from small renovations to major capital projects including new construction. Projects may involve multiple phases that can occur over the course of several months or years. VCU serves a wide variety of clients and customer satisfaction is our highest priority. The types of items being moved may include, but are not limited to, the following: office furniture, office systems furniture, classroom and library furniture, high-density filing systems, artwork and sculpture, office equipment, research laboratory equipment and personal belongings. The majority of relocations occur in the City of Richmond and surrounding counties, and may include, but are not limited to, facilities owned by the State of Virginia, facilities owned by the VCU Real Estate Foundation or facilities leased by the University. Please note, many of these moves will take place at night and on weekends due to the heavily scheduled facilities at VCU. All projects shall be limited to the University and shall not be affiliated or associated with VCU Health (hospital) projects.

**GOALS:** VCU requires “white glove” move management services by a person or firm with strong customer orientation, attention to detail as well as excellent organizational, problem-solving and interpersonal skills. Relocation projects can be extremely stressful to clients, particularly while the move is in progress. The move manager must be able to convey competency and poise under pressure and consistently demonstrate the ability to resolve issues in the field based on experience and with the client’s best interest in mind. The goal is to have a single point of contact who will seamlessly orchestrate the move from start to finish in compliance with the client’s needs and pre-determined schedule. Coordination with a VCU Project Manager and/or VCU Interior Designer shall be required. Coordination with VCU Construction Management, VCU Renovations, the VCU Campus Coordinator, VCU

Information Technology, VCU Environmental Health and Safety and other university resources shall be necessary, depending on the project and upon client request.

Skills:

The Move Manager shall have experience with move management and excel in the following skill sets:

- Planning and Organization
- Problem Solving
- Interpersonal Communication
- Budget Management

The Move Manager shall:

- Work directly with the client group to develop a detailed scope of work and schedule, to include a contingency plan to allow for poor weather conditions and other potential mishaps.
- Work with VCU's Project Manager to coordinate the procurement of movers and any other internal or external vendors required to ensure all items are disconnected, relocated and reconnected per the move parameters and in compliance with state procurement policies.
- Complete detailed furniture and equipment inventories to include asset tag identification numbers and coordinate surplus removal per VCU requirements.
- Complete field measurements, confirm site conditions and provide space plans to ensure the proper placement of items during each relocation.
- Create a color-coded move labeling system and corresponding signage to streamline each move.
- Provide detailed move instructions for presentation to the client group to ensure their understanding of all move preparations and that expectations are met in advance of each move.
- Arrange for interim storage and/or swing space relocations as needed.
- Staff the job as needed to ensure security and reliability in tracking the movement of the client's assets. It may be necessary to have a Move Manager at the origin, multiple origins, destination or multiple destinations at one time. There may also be circumstances in which multiple relocation projects are scheduled during the peak timeframes, such as Spring and Winter breaks, in which additional staffing would be required.
- Provide "Day One" services and follow-up on any move-related punch list items post-relocation as needed.
- Be responsible for providing these and all tasks detailed here and as dictated by the relocation project scope of work and VCU Project Manager's or Client Group's request for services.

## **VII. GENERAL REQUIREMENTS:**

### **A. Planning & Needs Assessment**

The contractor shall:

1. Meet with the client group(s) to complete a needs assessment and determine the move parameters. Define project scope and develop a master relocation schedule. Participate in regular on-site progress meetings with the project team.
2. Complete necessary site visits at each origin and destination facility. Determine the path of travel for the move, loading zones and loading dock access. Identify special requirements such as temporary parking permits for moving trucks or specialty relocation equipment.
3. Outline roles, responsibilities and interrelationships of all internal and external team members. Identify the “move liaisons” assigned to each department who will both assist in defining departmental needs and distribute important relocation information and instruction to all personnel.
4. Hold regular meetings with the move liaison’s to keep them informed and confident about the progress of the move.
5. Issue a project directory to include the names and contact information of all individuals and vendors associated with the relocation.
6. Generate a master spreadsheet to capture all employee “from” and “to” locations, telecommunication and network details. The following information shall be included in the master spreadsheet: personnel names, phone numbers [both existing and new phone number orders], fax numbers, “from” room locations, and “to” room locations. This information will be utilized for telecommunications coordination and to generate move signage to be posted in the destination(s) prior to the move.
7. Obtain and issue an “emergency” telephone list for reference during the relocation. Phone numbers shall include the cell phone numbers for move liaisons, building managers, campus coordinators, elevator repairmen, electricians and the general contractor.

B. Furniture, Fixtures and Equipment Coordination

The contractor shall:

1. Meet with each department to identify the placement of all furniture, fixtures and equipment being relocated into the new facility.
2. Complete an inventory of furniture, fixtures and equipment being relocated into the new facility to include measurements and photographs [as needed].
3. Review floor plans and ensure both space and operational needs (telecommunications, electrical, etc.) are met for all items being relocated. Confirm room dimensions within the new space will allow for item placement.
4. Provide space plans showing relocated items within the new facility for posting and reference during the move. Allow for up to two revisions.

C. Schedule Development and Maintenance

The contractor shall:



1. Interview managers and supervisors to learn what factors will influence the timing of each department's packing and relocation schedules.
2. Coordinate logistics and relocation schedules with VCU Campus Coordinators who will communicate whether or not any special events, activities or street closures will impact the move schedule.
3. Confirm construction completion and certificate of occupancy dates with the VCU Project Manager.
4. Prepare a day-by-day moving schedule for all departments and obtain approval from the VCU Project Manager.
5. Publish the move schedule to the move liaisons for distribution to all staff.
6. Publish the move schedule to the VCU Project Manager, VCU Interior Design Project Manager and VCU Campus Coordinator. Adjust, revise and redistribute according to any critical schedule changes such as those caused by construction, inspection or furniture installation delays.

D. Vendor Coordination

The contractor shall:

1. Work with the VCU Project Manager to select a move services vendor for the project.
2. Develop and issue a detailed relocation scope of work and schedule document to the move vendor for pricing.
3. Provide the move estimate to the VCU Project Manager for review and contract award.
4. Identify additional internal resources required to complete the move.
5. Work closely with the VCU Project Manager to engage services for VCU Desktop Support, VCU Net, VCU Telecommunications, VCU Surplus, VCU Facilities Management [i.e. lock shop, mechanical, electrical or plumbing technicians] and VCU Office of Environmental Health & Safety via the internal work order system.
6. Identify external resources required to complete the move.
7. Work closely with the client group to coordinate vendors and manufacturers responsible for relocating specialty office equipment and leased copier equipment that cannot be relocated by a local commercial moving company (i.e. research lab equipment, food service vendors, coffee vendors, copier service technicians). If biosafety cabinets are included in the relocation, coordinate decontamination and recertification efforts with the VCU client group.
8. Develop and issue a detailed relocation scope of work and schedule document to VCU Desktop Support or the departmental technology services individual who will be responsible for the disconnection and reconnection of all desktop computers, printers, scanners, fax machines and phones.
9. Provide the master relocation document of employee "from" and "to" locations to include phone numbers, fax numbers and new phone number orders to the VCU

Telecommunications technician assigned to the project via the work order issued by the VCU Project Manager.

10. If surplus is included in the project scope of work, the contractor shall complete the VCU Surplus form to include a detailed surplus inventory. All asset tags for furniture and equipment shall be included on the surplus form. If research lab equipment is included in the surplus, coordinate review and signature approval on the surplus form through the Office of Environmental Health and Safety. Provide the completed form and inventory to VCU Surplus and reference the work order issued by the VCU Project Manager. Coordinate the date and time of all surplus warehouse deliveries directly with VCU Surplus warehouse staff located at: VCU Surplus Property, 1050 Oliver Hill Way, Richmond, VA 23298. Days and hours of operation are Monday to Friday, from 8 AM to 4 PM.
11. If VCU Facilities Management services are required, such as access control or utility needs (electrical, mechanical or plumbing), the contractor shall coordinate those requests directly with the technician assigned to the project via the work order issued by the VCU Project Manager.

E. Packing and Labeling

The contractor shall:

1. Develop a detailed labeling system customized to meet the needs of the client so that items are packed, relocated and unpacked efficiently. The move labeling and signage system shall be based on the path of travel from the elevator and/or suite entry and must identify, by separate number, all potential areas in which items would be placed. Create relocation floor plans to demonstrate the move numbering system. Create and hang corresponding relocation signage and move plans at the destination(s).
2. Provide pre-move instruction and training for user groups via a "Town Hall" packing demonstration. Packing services cannot be provided by the move vendor. VCU Departments shall be responsible for packing, unpacking and labeling computers, phones, printers and the contents of their offices.
3. Customize and provide packing instruction documents to meet the needs of the client. Include detailed information with regard to the schedule, packing materials and how to prepare for the relocation.
4. Post directional and move signs at the destination in accordance with the labeling system prior to the move. Move signs shall be posted in all areas where items are to be relocated.
5. Post plans of the building with color-coded sections in accordance with the labeling system. Plans shall be posted at the loading zones and elevator lobbies for reference during the move.
6. Label furniture, fixtures and equipment as needed.

F. Relocation Logistics Coordination and On-Site Support

The contractor shall:

1. Field-verify critical dimensions along the path of travel at both origin and destination (i.e. ensure large items will clear hallways, doorways, elevators). Identify any areas

of concern and ensure a clear path of travel will be available and secured for the move.

2. Obtain and confirm elevator capacity levels for all locations.
3. Coordinate loading zone and loading dock access with the Campus Coordinator. Should moving trucks need to utilize areas designated for street parking on either the Monroe Park or MCV Campus, place a request through the VCU Police for a temporary parking permit. Once approved, the VCU Police will post "No Parking" signs 48 hours in advance of the move to advise the public. Ensure vehicular access to the Emergency Department on the MCV Campus is never blocked.
4. Coordinate access to both facilities in preparation for the move.
5. Request temporary reprogramming of door prop alarms with building security as needed.
6. Request elevator keys with property management as needed.
7. Obtain loading dock, elevator and office keys as needed prior to the move for all locations. This is to include security keys for card access systems if required for after-hours access.
8. For leased facilities, obtain the necessary insurance documentation from all delivery vendors as required per the building rules and regulations prior to the relocation.
9. Work closely with the technology group on the disconnection and reconnection of all equipment during each move.
10. Work closely with other 3<sup>rd</sup> party vendors who may be relocating or installing items at the new facility to ensure all trades will have clear access to specific loading and unloading zones during each move day.
11. Walk the new building with the floor plans to review potential changes in walls and doors as well as check clearances that may obstruct the path of travel for placement of items within the space.
12. Conduct origin and destination site walk-through with move supervisor prior to the move date.
13. Coordinate all packing material deliveries and meet the crews on-site for direction on placement of all materials.
14. Provide on-site supervision and mover direction during the course of the relocation.
15. Confirm all items have been labeled correctly and adequately prepared for transport.
16. Complete a walk-through at the origin to ensure all items have been removed in accordance with the relocation plans and schedule.
17. Conduct post-move walk-through to verify correct placement of items prior to releasing the crew.

G. Post-Move Coordination

The contractor shall:

1. Arrange for the placement of a “Day One Checklist” on all desks to ensure all items have been relocated in accordance with the relocation plans and are functioning properly.
2. Identify items needing adjustment via post-move “fine-tune” crew.
3. Address all post-move related issues with the appropriate vendor.
4. Coordinate and schedule packing material pick-up and rearrange items as needed.
5. Review and approve move contractor invoices for forward to the VCU Project Manager for payment processing.
6. Provide a final compilation of the relocation cost in the form of a final recap.

## **VIII. MOVE MANAGEMENT REQUIREMENTS:**

### **A. Project-Initiated Move Management Procedures**

1. Procurement of Move Management Services
  - a. A VCU Planning & Design, Construction or Renovations Project Manager would schedule a meeting with the Move Manager to provide the scope of services, schedule and floor plans for pricing move management services.
  - b. The Project Manager shall review the estimate, and if approved, shall engage the move manager via EP request.
  - c. The Project Manager shall facilitate and attend a meeting between the client group and move manager.
  - d. The Move Manager shall work directly with the client group to complete all required planning and coordination tasks detailed in the Move Manager Statement of Work.
2. Procurement of Internal Resources
  - a. The Move Manager shall provide the VCU Project Manager a list of requirements for internal resources which may include, but is not limited to:
    - VCU Desktop Support [PC and Phone Disconnects/Reconnects]
    - VCU Net [Data Connection Adds/Relocations]
    - VCU Telecommunications [Fax Relocations/New Phone Orders]
    - VCU Surplus [Excess Furniture and Equipment Removal]
    - VCU Shop Services [Ex. Lock shop, HVAC, Electrical, Plumbing]
    - VCU OEHS [Hazardous Material Relocation]
  - b. The VCU Project Manager proceeds with the appropriate work orders or adds phases to existing work orders for the required resources, followed by notification to the Move Manager.
3. Procurement of External Resources
  - a. The Move Manager shall generate a scope of work and schedule document for the move.

- b. The Move Manager shall issue the documents to the VCU Project Manager who will determine the appropriate move vendor for the project.
- c. The Move Manager shall coordinate a meeting with the assigned move vendor to complete a walk-through of the origin and destination facilities in order to develop an estimate for move labor and materials.
- d. The Move Manager shall provide the VCU Project Manager the estimate and recommendations. If approved, the VCU Project Manager initiates the EP request with the move vendor to engage move services.

The current preferred move vendors include:

- Richmond Commercial Services, VASCUPP Contract
- Hilldrup Moving and Storage, DGS Contract
- Kloke Group, DGS Zone Contract

The Move Manager works directly with the client group, who is responsible for coordination of the following external resources in conjunction with the relocation:

- Biosafety Cabinet Decontaminations/Recertification's
- Hazardous Material Moves/Waste Removal
- Relocation of leased equipment under warranty by 3<sup>rd</sup> party vendor

#### 4. Move Schedule

- a. The Move Manager shall provide the VCU Project Manager with a detailed schedule with regard to the move plan.
- b. The VCU Project Manager will keep the Move Manager informed with regard to any schedule changes and adjustments.

#### 5. Project Close Out

- a. The Move manager shall review invoices related to external resources and confirm accuracy before forwarding to VCU Project Manager for payment.
- b. The Move manager shall provide a recap to the VCU Project Manager at project close of all costs to date.

### B. Customer-Initiated Move Management Procedures

1. Client Initiates Request via QuickFM (see **attachment B** for definition and web link)
  - a. The VCU client initiates a request for move services via the QuickFM system.
  - b. The QuickFM Customer Service Representative forwards all move services requests to VCU's General Services Manager for Physical Plant Support Services and Special Projects.
  - c. VCU's General Services Manager for Physical Plant Support Services and Special Projects and VCU's Relocation Management Services Contract Administrator will meet with the client(s) to determine the relocation scope of work.
  - d. Should the project include any of the following parameters, move management services shall be required:
    - Evening and/or Weekend Move Management
    - Multiple Phases/Multiple Facilities

- High Volume (large number of employees; high volume of contents and furnishings)
- Inventory and Space Planning
- Leased Property; Property Management Coordination

If move management services are required, VCU's Relocation Management Services Contract Administrator will place a formal request for proposal with the Move Management firm.

## 2. Procurement of Move Management Services

- a. VCU's Relocation Management Services Contract Administrator facilitates and attends a meeting with the Move Manager and/or the client to provide the scope of services, schedule and floor plans for pricing move management services.
- b. VCU's Relocation Management Services Contract Administrator reviews the estimate for move management services for approval and forward to the client group. Once the client approves the quote and provides an index code, the quote and index code would be issued to VCU's General Services Manager for Physical Plant Support Services and Special Projects to engage move management services via an EP request.
- c. The Move Manager works directly with the client group to complete all required planning and coordination tasks detailed in the Move Manager Statement of Work.

## 3. Procurement of Internal Resources

- a. The Move Manager shall provide the client with a list of requirements for internal resources which could include, but is not limited to:
  - VCU Desktop Support [PC and Phone Disconnects/Reconnects]
  - VCU Net [Data Connection Adds/Relocations]
  - VCU Telecommunications [Fax Relocations/New Phone Orders]
  - VCU Surplus [Excess Furniture and Equipment Removal]
  - VCU Shop Services [Ex. Lockshop, HVAC, Electrical, Plumbing]
  - VCU OEHS [Hazardous Material Relocation]

The client proceeds with the appropriate work orders for the required resources.

## 4. Procurement of External Resources

- a. The Move Manager shall generate a scope of work and schedule document for the move.
- b. The Move Manager shall issue the document to VCU's General Services Manager for Physical Plant Support Services and Special Projects, who will determine the appropriate move vendor for the project.
- c. The Move Manager shall coordinate a meeting with the move vendor to complete a walk-through of the origin and destination facilities in order to develop an estimate for move labor and materials.
- d. The Move Manager shall provide the client the estimate and recommendations. If approved, the Move Manager generates a request through VCU's General Services Manager for Physical Plant Support Services and Special Projects to initiates the EP request to engage move services. The request must include

detailed specifics with regard to the scope of services, schedule and the client-provided budget code.

The current preferred move vendors include:

- Richmond Commercial Services, VASCUPP Contract
- Hilldrup Moving and Storage, DGS Contract
- Kloke Group, DGS Zone Contract

The Move Manager shall work directly with the client group, who is responsible for coordination of the following external resources in conjunction with the relocation:

- Biosafety Cabinet Decontaminations/Recertification's
- Hazardous Material Moves/Waste Removal
- Relocation of leased equipment under warranty by 3<sup>rd</sup> party vendor

5. Move Schedule

- a. The Move Manager shall provide the client a detailed schedule with regard to the move plan.
- b. The client keeps the Move Manager informed with regard to any schedule changes and adjustments.

6. Project Close Out

- a. The Move Manager shall review invoices related to external resources and confirms accuracy before forwarding to VCU's General Services Manager for Physical Plant Support Services and Special Projects for payment.
- b. The Move manager shall provide a recap to VCU's General Services Manager for Physical Plant Support Services and Special Projects at project close with regard to the scope of services and move labor provided as well as move duration, in order for VCU to proceed with appropriate and timely invoice approvals and processing.

**IX. PROPOSAL PREPARATION AND SUBMISSION INSTRUCTIONS:**

A. General Instructions:

1. In order to be considered for award, proposal submissions must contain, at minimum, the following:
  - a. Company Qualifications and Experience
  - b. Responses to all requirements listed in sections VI, VII and VIII above
  - c. A list of three references for whom similar services were provided, preferably for similar sized projects.
  - d. Pricing Schedule as required in Attachment A
  - e. SWaM documentation as required in Section XV

2. Complete and return page 2 of the RFP. Proposals shall be signed by an authorized representative of the Offeror. By submitting a Proposal, offerors certify that all information provided in response to the Request for Proposals is true and accurate. Failure to provide information required by this Request for Proposals will ultimately result in rejection of the Proposal.
3. Complete and return signed addenda acknowledgments (if applicable).
4. Submit one (1) original hard copy (paper) document of the entire Proposal, including all attachments and all proprietary information (see #7 below). Submit one (1) unsecured, electronic copy (on a disc or flash drive) of the entire Proposal including all attachments and any proprietary information.
5. If applicable, Submit one (1) unsecured, electronic copy (on a disc or flash drive) of the entire Proposal including all attachments and EXCLUDING ANY PROPRIETARY INFORMATION. This disc or flash drive must be clearly marked on the outside that it **excludes** proprietary information.
6. Proposals should be prepared simply and economically, providing a straightforward, concise description of capabilities to satisfy the requirements of the RFP. Emphasis should be placed on completeness and clarity of content.
7. Provide the proposed plans, methodology, and approach for providing the products and services as specified in the RFP. Specifically indicate what is included in the offer to provide the requested services by responding to all Items in Section VI, VII and VIII.
8. All information requested must be submitted. Failure to submit all information requested may result in the University requiring prompt submission of missing information and/or giving a lowered evaluation of the proposal. Proposals which are substantially incomplete or lack key information may be rejected by the University, at the University's sole discretion.
9. If applicable, the outside of the Proposal must be marked to clearly denote proprietary information is contained in the documents. **Written notice of proprietary information must be submitted as the first page of the Offeror's Proposal.** Notice must specifically identify the applicable portions of the Offeror's Proposal that contain data or materials to be protected and shall state the reasons why protection is necessary. In addition, the specific (i.e. specific words, figures or paragraphs) proprietary or trade secret material submitted, must be identified on the applicable page(s) within the Offeror's Proposal, by some distinct method, such as highlighting, underlining, etc. **The classification of an entire Proposal document, line item prices and/or total Proposal prices as proprietary or trade secrets is not acceptable and may result in rejection and return of the Proposal, at the University's sole discretion.**
10. Proposals should be organized in the order in which the requirements are presented in the RFP. All pages of the proposal should be numbered. Each paragraph in the proposal should reference the paragraph number of the corresponding section of the RFP. It is also helpful to cite the paragraph number, sub letter, and repeat the text of the requirement as it appears in the RFP. If a response covers more than one page, the paragraph number and sub letter should be repeated at the top of the next page. The proposal should contain a table of contents, which cross-references the RFP requirements. Information which the offeror desires to present that does not fall



within any of the requirements of the RFP should be inserted at an appropriate place or be attached at the end of the proposal and designated as additional material. Proposals that are not organized in this manner risk elimination from consideration if the evaluators are unable to find the RFP requirements are specifically addressed.

11. Ownership of all data, materials and documentation originated and prepared for VCU pursuant to the RFP shall belong exclusively to VCU and be subject to public inspection in accordance with the Virginia Freedom of Information Act. Trade secrets or proprietary information submitted by an Offeror shall not be subject to public disclosure under the Virginia Freedom of Information Act; however, the Offeror must invoke the protections of Section 34F of The Governing Rules, in writing, either before or at the time the data or other material is submitted. The outside of the proposal must be marked to denote proprietary information is contained in the documents. The written notice must:
  1. be submitted as an attachment to the Offeror's proposal;
  2. specifically identify the applicable portions of the Offeror's proposal that contains data or materials to be protected (e.g. Tab 4, pages 1 through 3); and
  3. state the reasons why protection is necessary
12. Invoicing and Payment: Firm must complete Appendix II which is available at: [http://documents.procurement.vcu.edu/purchasing/pdf\\_docs/forms/RFP\\_Website\\_Link\\_Appendix\\_2.pdf](http://documents.procurement.vcu.edu/purchasing/pdf_docs/forms/RFP_Website_Link_Appendix_2.pdf)
13. Communications regarding this Request for Proposals (RFP) shall be formal from the date of the issuance for this RFP, until either a Contractor has been selected or the University Procurement Services Department rejects all proposals. Formal communications shall be directed to the University Procurement Department only. Informal communications including but not limited to, request for information, comments or speculations, regarding this RFP to any University employee other than Procurement Services Department representative may result in the offending Offeror's Proposal being rejected.
14. Oral Presentation: Offerors who submit a proposal in response to this RFP may be required to conduct an oral presentation of their proposal to VCU. Oral presentations are an option and may or may not be required. Should an oral presentation be required, VCU will designate the date and location for the presentation; the date is critical and alternative dates will not be available. Offerors who are invited to conduct an oral presentation shall include the individual(s) who would be the primary point of contact for VCU, on the Offerors presentation team. VCU reserves the right to rescore proposals following oral presentations.
15. The version of the solicitation issued by the Virginia Commonwealth University Purchasing Department as amended by any addenda is the mandatory controlling version of the document. Any modification of or additions to the solicitation by the Offeror shall not modify the official version of the solicitation issued by the Virginia Commonwealth University Purchasing Department unless accepted in writing by the University. Such modifications or additions to the solicitation by the Offeror may be cause for rejection of the proposal; however, Virginia Commonwealth University reserves the right to decide, on a case by case basis, in its sole discretion, whether to reject such a proposal. If the modifications or additions are not identified until

after the award of the contract, the controlling version of the solicitation document shall still be the official state form issued by the Purchasing Department.

16. Exceptions: Firm must note any exceptions to any of the requirements and/or any of the terms and conditions stated in this RFP in *Appendix III: Exceptions*.

13. Additional information is available at:

<http://go.vcu.edu/procurement-purchasing>

## **X. EVALUATION AND AWARD CRITERIA:**

Proposals will be evaluated based upon the information provided in the Offeror's Proposal using the criteria specified below and selection shall be made of two or more Offerors deemed to be fully qualified and best suited among those submitting proposals on the basis of the evaluation factors included in the Request for Proposal, including price, if so stated in the Request for Proposals. Negotiations shall be conducted with Offerors so selected. Price shall be considered, but need not be the sole determining factor. After negotiations have been conducted with each Offeror so selected, the agency shall select the Offeror which, in its opinion, has made the best proposal, and shall award the contract to that Offeror. The Commonwealth reserves the right to make multiple awards as a result of this solicitation. The Commonwealth may cancel this Request for Proposals or reject proposals at any time prior to an award, and is not required to furnish a statement of the reason why a particular proposal was not deemed to be the most advantageous. (*Governing Rules Section 49-D*). Should the Commonwealth determine in writing and in its sole discretion that only one Offeror is fully qualified, or that one Offeror is clearly more highly qualified than the others under consideration, a contract may be negotiated and awarded to that Offeror. The award document will be a contract incorporating by reference all the requirements, terms and conditions of the solicitation and the Contractor's proposal as negotiated.

Notice of Award(s) or Notice of Intent to Award may be accessed electronically at

<http://www.eva.virginia.gov> for a minimum of 10 days

### **A. Evaluation Criteria:**

Proposals shall be evaluated by VCU using the following criteria:

1. **Qualifications and Experience (30%):** The Firm's relevant expertise and experience in conducting move services for institutions of higher education
2. **Methodology/Approach (30%):** Demonstrated ability to prepare and utilize a planning process that meets the statement of needs assigned to this RFP
3. **Pricing (20%)**
4. **Current and Projected Workload (10%):** Number of staff/ability to pull in additional staff when needed for larger projects or multiple projects at one time)
5. **SWaM Status/Utilization (10%):** *Offeror's status as a Virginia certified SWaM Business or the Offeror's plans to utilize Virginia DSBSD-certified SWaM Businesses in the Offeror's performance of the contract*

## **XI. Fees:** Please Complete and sign Attachment "A"-Pricing

## **XII. GENERAL TERMS AND CONDITIONS:**

- A. **PURCHASING MANUAL:** This RFP is subject to the provisions of the Commonwealth of Virginia's Purchasing Manual for Institutions of Higher Education and their Vendors and any revisions thereto, which are hereby incorporated into this contract in their entirety. A copy of the manual is available for review at the VCU Procurement Services Office. In addition, the manual may be accessed electronically at <http://procurement.vcu.edu/> or a copy can be obtained by calling VCU Procurement Services at (804) 828-1077.
- B. **APPLICABLE LAW AND COURTS:** This RFP and any resulting Contract shall be governed in all respects by the laws of the Commonwealth of Virginia and any litigation with respect thereto shall be brought in the courts of the Commonwealth. The Contractor shall comply with all applicable federal, state and local laws, rules and regulations.
- C. **ANTI-DISCRIMINATION:** By submitting their Proposals, Offerors certify to the Commonwealth and to VCU that they will conform to the provisions of the Federal Civil Rights Act of 1964, as amended, as well as the Virginia Fair Employment Contracting Act of 1975, as amended, where applicable, the Virginians With Disabilities Act, the Americans With Disabilities Act and Section 2.2-4311 of the *Virginia Public Procurement Act*. If the award is made to a faith-based organization, the organization shall not discriminate against any recipient of goods, services, or disbursements made pursuant to the contract on the basis of the recipient's religion, religious belief, refusal to participate in a religious practice, or on the basis of race, age, color, gender or national origin and shall be subject to the same rules as other organizations that contract with public bodies to account for the use of the funds provided; however, if the faith-based organization segregates public funds into separate accounts, only the accounts and programs funded with public funds shall be subject to audit by the public body. (*Code of Virginia*, § 2.2-4343.1).

In every Contract over \$10,000 the provisions in 1. and 2. below apply:

1. During the performance of this Contract, the Contractor agrees as follows:
  - a) Virginia Commonwealth University is an equal opportunity/affirmative action institution providing access to education and employment without regard to age, race, color, national origin, gender, religion, sexual orientation, veteran's status, political affiliation or disability. As such, the Contractor will not discriminate against any employee or applicant for employment because of age, race, color, national origin, gender, religion, sexual orientation, veteran's status, political affiliation or disability or any other basis prohibited by state law related to discrimination in employment, except where there is a bona fide occupational qualification reasonably necessary to the normal operation of the Contractor. The Contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices setting forth the provisions of this nondiscrimination clause.
  - b) The Contractor, in all solicitations or advertisements for employees placed by or on behalf of the Contractor, will state that such Contractor is an equal opportunity employer.

- c) Notices, advertisements and solicitations placed in accordance with federal law, rule or regulation shall be deemed sufficient for the purpose of meeting these requirements.
  2. The Contractor will include the provisions of 1. above in every subcontract or purchase order over \$10,000, so that the provisions will be binding upon each subcontractor or vendor.
- D. ETHICS IN PUBLIC CONTRACTING: By submitting their Proposals, Offerors certify that their Proposals are made without collusion or fraud and that they have not offered or received any kickbacks or inducements from any other Offeror, supplier, manufacturer or subcontractor in connection with their Proposal, and that they have not conferred on any public employee having official responsibility for this procurement transaction any payment, loan, subscription, advance, deposit of money, services or anything of more than nominal value, present or promised, unless consideration of substantially equal or greater value was exchanged.
- E. IMMIGRATION REFORM AND CONTROL ACT OF 1986: By submitting their Proposals, Offerors certify that they do not and will not during the performance of this Contract employ illegal alien workers or otherwise violate the provisions of the Federal Immigration Reform and Control Act of 1986.
- F. DEBARMENT STATUS: By submitting their Proposals, Offerors certify that they are not currently debarred by the Commonwealth of Virginia from submitting proposals on contracts for the type of goods and/or services covered by this solicitation, nor are they an agent of any person or entity that is currently so debarred.
- G. ANTITRUST: By entering into a Contract, the Contractor conveys, sells, assigns, and transfers to the Commonwealth of Virginia all rights, title and interest in and to all causes of the action it may now have or hereafter acquire under the antitrust laws of the United States and the Commonwealth of Virginia, relating to the particular goods or services purchased or acquired by the Commonwealth of Virginia under said contract.
- H. MANDATORY USE OF STATE FORM AND TERMS AND CONDITIONS: Failure to submit a Proposal on the official VCU Form provided for that purpose may be a cause for rejection of the Proposal. Modification of, or additions to, the General Terms and Conditions of the solicitation may be cause for rejection of the Proposal; however, the Commonwealth reserves the right to decide, on a case by case basis, in its sole discretion, whether to reject such a Proposal.
- I. PAYMENT:
1. To Prime Contractor:
    - a) Invoices for items ordered, delivered and accepted shall be submitted by the Contractor directly to the payment address shown on the purchase order/Contract. All invoices shall show the VCU Contract number and/or purchase order number; social security number (for individual Contractors) or

the federal employer identification number (for proprietorships, partnerships, and corporations).

- b) Any payment terms requiring payment in less than thirty (30) days will be regarded as requiring payment thirty (30) days after invoice or delivery, whichever occurs last. This shall not affect offers of discounts for payment in less than thirty (30) days, however.
- c) All goods or services provided under this Contract or purchase order, that are to be paid for with public funds, shall be billed by the Contractor at the contract price, regardless of which public institution is being billed.
- d) The following shall be deemed to be the date of payment: the date of postmark in all cases where payment is made by mail, or the date of offset when offset proceedings have been instituted as authorized under the Virginia Debt Collection Act.
- e) Unreasonable Charges. Under certain emergency procurements and for most time and material purchases, final job costs cannot be accurately determined at the time orders are placed. In such cases, contractors should be put on notice that final payment in full is contingent on a determination of reasonableness with respect to all invoiced charges. Charges which appear to be unreasonable will be researched and challenged, and that portion of the invoice held in abeyance until a settlement can be reached. Upon determining that invoiced charges are not reasonable, VCU shall promptly notify the contractor, in writing, as to those charges which it considers unreasonable and the basis for the determination. A Contractor may not institute legal action unless a settlement cannot be reached within thirty (30) days of notification. The provisions of this Section do not relieve VCU of its prompt payment obligations with respect to those charges that are not in dispute (Code of Virginia, § 2.2-4363).

## 2. To Subcontractors:

- a) Contractor awarded a contract under this RFP is hereby obligated:
  - i. To pay the Subcontractor(s) within seven (7) days of the Contractor's receipt of payment from VCU for the proportionate share of the payment received for work performed by the Subcontractor(s) under the contract; or
  - ii. To notify VCU and the Subcontractor(s), in writing, of the Contractor's intention to withhold payment and the reason.
- b) The Contractor is obligated to pay the Subcontractor(s) interest at the rate of one percent per month (unless otherwise provided under the terms of the contract) on all amounts owed by the Contractor that remain unpaid seven (7) days following receipt of payment from VCU, except for amounts withheld as stated in 2. above. The date of mailing of any payment by U.S. Mail is deemed to be payment to the addressee. These provisions apply to each sub-tier

Contractor performing under the primary contract. A Contractor's obligation to pay an interest charge to a Subcontractor may not be construed to be an obligation of VCU.

- J. PRECEDENCE OF TERMS: Paragraphs A-J of these General Terms and Conditions shall apply in all instances. In the event there is a conflict between any of the other General Terms and Conditions and any Special Terms and Conditions in this solicitation, the Special Terms and Conditions shall apply.
- K. QUALIFICATIONS OF OFFERORS: VCU may make such reasonable investigations as deemed proper and necessary to determine the ability of the Offeror to perform the services/furnish the goods and the Offeror shall furnish to VCU all such information and data for this purpose as may be requested. VCU reserves the right to inspect Offeror's physical facilities prior to award to satisfy questions regarding the Offeror's capabilities. VCU further reserves the right to reject any Proposal if the evidence submitted by, or investigations of, such Offeror fails to satisfy VCU that such Offeror is properly qualified to carry out the obligations of the Contract and to provide the services and/or furnish the goods contemplated therein.
- L. TESTING AND INSPECTION: VCU reserves the right to conduct any test/inspection it may deem advisable to assure goods and services conform to the specifications.
- M. ASSIGNMENT OF CONTRACT: A Contract shall not be assignable by the Contractor in whole or in part without the written consent of the VCU Director of Procurement Services.
- N. CHANGES TO THE CONTRACT: Changes can be made to the Contract in any one of the following ways:
1. The parties may agree in writing to modify the scope of the Contract. An increase or decrease in the price of the Contract resulting from such modification shall be agreed to by the parties as a part of their written agreement to modify the scope of the Contract.
  2. The VCU Procurement Services Department may order changes within the general scope of the Contract at any time by written notice to the Contractor. Changes within the scope of the contract include, but are not limited to, things such as services to be performed, the method of packing or shipment, and the place of delivery or installation. The Contractor shall comply with the notice upon receipt. The Contractor shall be compensated for any additional costs incurred as the result of such order and shall give VCU a credit for any savings. Said compensation shall be determined by one of the following methods:
    - a) By mutual agreement between the parties in writing; or
    - b) By agreeing upon a unit price or using a unit price set forth in the Contract, if the work to be done can be expressed in units, and the Contractor accounts for the number of units of work performed, subject to the VCU's right to audit the Contractor's records and/or to determine the correct number of units independently; or

- c) By ordering the Contractor to proceed with the work and keep a record of all costs incurred and savings realized. A markup for overhead and profit may be allowed if provided by the Contract. The same markup shall be used for determining a decrease in price as the result of savings realized. The Contractor shall present VCU with all vouchers and records of expenses incurred and savings realized. VCU shall have the right to audit the records of the Contractor as it deems necessary to determine costs or savings. Any claim for an adjustment in price under this provision must be asserted by written notice to VCU within thirty (30) days from the date of receipt of the written order from VCU. If the parties fail to agree on an amount of adjustment, the question of an increase or decrease in the Contract price or time for performance shall be resolved in accordance with the procedures for resolving disputes provided by the Disputes Clause of this Contract or, if there is none, in accordance with the disputes provisions of the Commonwealth of Virginia's Purchasing Manual for Institutions of Higher Education and Their Vendors. Neither the existence of a claim or a dispute resolution process, litigation or any other provision of this Contract shall excuse the Contractor from promptly complying with the changes ordered by the VCU Procurement Service Office or with the performance of the Contract generally.
- O. DEFAULT: In case of failure to deliver goods or services in accordance with the Contract terms and conditions, VCU after due oral or written notice, may procure them from other sources and hold the Contractor responsible for any resulting additional purchase and administrative costs. This remedy shall be in addition to any other remedies which VCU may have in law or equity.
- P. USE OF BRAND NAMES: Unless otherwise provided in this RFP, the name of a certain brand, make or manufacturer does not restrict Offerors to the specific brand, make or manufacturer named, but conveys the general style, type, character, and quality of the article desired. Any article, which the public body, in its sole discretion, determines to be the equal of that specified, considering quality, workmanship, economy of operation, and suitability for the purpose intended, shall be accepted. The Offeror is responsible to clearly and specifically identify the product being offered and to provide sufficient descriptive literature, catalog cuts and technical detail to enable VCU to determine if the product offered meets the requirements of the solicitation. This is required even if offering the exact brand, make or manufacturer specified. Unless the Offeror clearly indicates in its proposal that the product offered is an "equal" product, such proposal will be considered to offer the brand name product referenced in the RFP.
- Q. TRANSPORTATION AND PACKAGING: By submitting their Proposals, all Offerors certify and warrant that the price offered for FOB Destination includes only the actual freight rate costs at the lowest and best rate and is based upon the actual weight of the goods to be shipped. Except as otherwise specified herein, standard commercial packaging, packing and shipping containers shall be used. All shipping containers shall be legibly marked or labeled on the outside with purchase order number, commodity description, and quantity. Further, Offeror shall bear the risk of loss until the goods and equipment until VCU accepts Delivery of them.



- R. INSURANCE: By signing and submitting a Proposal under this RFP, the Offeror certifies that if awarded the Contract, it will have the following insurance coverages at the time the Contract is awarded. For construction contracts, if any Subcontractors are involved, the subcontractor will have workers' compensation insurance in accordance with §§ 2.2-4332 and 65.2-800 et seq. of the *Code of Virginia*. The Offeror further certifies that the Contractor and any Subcontractors will maintain these insurance coverages during the entire term of the Contract and that all insurance coverage will be provided by insurance companies authorized to sell insurance in Virginia by the Virginia State Corporation Commission.

Minimum Insurance Coverages and Limits Required for Most Contracts:

1. Worker's Compensation - Statutory requirements and benefits. Coverage is compulsory for employers of three or more employees, to include the employer. Contractors who fail to notify VCU of increases in the number of employees that change their workers' compensation requirements under the *Code of Virginia* during the course of the Contract shall be in noncompliance with the Contract.
  2. Employers Liability - \$100,000.
  3. Commercial General Liability - \$1,000,000 per occurrence. Commercial General Liability is to include bodily injury and property damage, personal injury and advertising injury, products and completed operations coverage. VCU must be named as an additional insured and so endorsed on the policy.
  4. Automobile Liability - \$1,000,000 per occurrence. (Only used if motor vehicle is to be used in the contract.)
- S. ANNOUNCEMENT OF AWARD: Upon the award or the announcement of the decision to award a contract as a result of this RFP, VCU will publicly post such notice electronically at <http://www.eva.virginia.gov> for a minimum of ten (10) days.
- T. DRUG-FREE WORKPLACE: During the performance of this Contract, the Contractor agrees to (i) provide a drug-free workplace for the Contractor's employees; (ii) post in conspicuous places, available to employees and applicants for employment, a statement notifying employees that the unlawful manufacture, sale, distribution, dispensation, possession, or use of a controlled substance or marijuana is prohibited in the contractor's workplace and specifying the actions that will be taken against employees for violation of such prohibition; (iii) state in all solicitations or advertisements for employees placed by or on behalf of the Contractor that the Contractor maintains a drug-free workplace; and (iv) include the provisions of the foregoing clauses in every Subcontract or purchase order of over \$10,000, so that the provisions will be binding upon each Subcontractor and/ or Vendor.

For the purposes of this section, "*drug-free workplace*" means a site for the performance of work done in connection with a specific Contract awarded to a Contractor, the employees of whom are prohibited from engaging in the unlawful manufacture, sale,



distribution, dispensation, possession or use of any controlled substance or marijuana during the performance of the Contract.

U. **NONDISCRIMINATION OF CONTRACTORS:** A Bidder, Offeror, or Contractor shall not be discriminated against in the solicitation or award of this Contract because of race, religion, color, sex, national origin, age, disability, or against faith-based organizations or any other basis prohibited by state law relating to discrimination in employment. If the award of this Contract is made to a faith-based organization and an individual, who applies for or receives goods, services, or disbursements provided pursuant to this Contract objects to the religious character of the faith-based organization from which the individual receives or would receive the goods, services, or disbursements, the public body shall offer the individual, within a reasonable period of time after the date of his objection, access to equivalent goods, services, or disbursements from an alternative provider.

V. **eVA BUSINESS-TO-GOVERNMENT VENDOR REGISTRATION, CONTRACTS, AND ORDERS:** The eVA

Internet electronic procurement solution, website portal [www.eVA.virginia.gov](http://www.eVA.virginia.gov), streamlines and automates government purchasing activities in VCU. The eVA portal is the gateway for vendors to conduct business with VCU Institution and other public bodies. All Vendors desiring to provide goods and/or services to VCU shall participate in the eVA Internet e-procurement solution by completing the free eVA Vendor Registration.

Vendor Transaction Fees are determined by the date the original purchase order is issued and are as follows:

1. For orders issued July 1, 2014 and after, the Vendor Transaction Fee is:
  - a) DSBSD-certified Small Businesses: 1%, capped at \$500 per order.
  - b) Businesses that are not DSBSD-certified Small Businesses: 1%, capped at \$1,500 per order.
2. For orders issued July 1, 2014 the vendor transaction fees can be found at [www.eVA.virginia.gov](http://www.eVA.virginia.gov)

The specified vendor transaction fee will be invoiced, by the Commonwealth of Virginia Department of General Services, approximately thirty (30) days after the corresponding purchase order is issued and payable thirty (30) days after the invoice date. Any adjustments (increases/decreases) will be handled through purchase order changes.

### **XIII.SPECIAL TERMS AND CONDITIONS:**

A. **ADVERTISING:** In the event a contract is awarded for supplies, equipment, or services resulting from this proposal, no indication of such sales or services to Virginia Commonwealth University will be used in product literature or advertising. The Contractor shall not state in any of the advertising or product literature that the Commonwealth of Virginia or any agency or institution of the Commonwealth has purchased or uses its products or services.

- B. ADDITIONAL USERS OF CONTRACT: It is the University's intent to provide other Virginia Association of State College and University Purchasing Professionals (VASCUPP) with access to the University's Agreements and to provide Contractors with opportunities to do business with other VASCUPP institutions of higher education. To that end and if agreeable with the Contractor, the following Colleges and Universities listed are the VASCUPP institutions and may have access to any agreement resulting from this solicitation: College of William and Mary, University of Virginia, George Mason University, Virginia Military Institute, James Madison University, Old Dominion University, Virginia Polytechnic Institute & State University and Radford University. Upon written request from a VASCUPP institution, the Contractor may allow access to the Contract. Although the University desires to provide access on such contract to VASCUPP, the Contractor is not required to provide such access. A firm's willingness to provide this access to VASCUPP members will not be a consideration in awarding this contract. Although the VASCUPP Agencies may have access to any resulting Agreement, VASCUPP is not bound to use the Agreement and any use of the Agreement is strictly optional. If the VASCUPP institutions choose to access the Agreement and the Contractor agrees to such access, the terms and conditions of the Agreement will be in full force and effect as between the VASCUPP institutions and the Contractor. VCU will have no responsibility for the resolution of any contractual disputes, or for payment for services rendered which may arise from a VASCUPP institution accessing the Agreement. The Contractor understands and agrees that it shall not have any recourse against VCU with respect to any claim it may have against another VASCUPP institution that accessed this Agreement.
- C. AUDIT: The Contractor shall retain all books, records, and other documents relative to this contract for five (5) years after final payment, or until audited by the Commonwealth of Virginia, whichever is sooner. The agency, its authorized agents, and/or State auditors shall have full access to and the right to examine any of said materials during said period.
- D. AVAILABILITY OF FUNDS: It is understood and agreed between the parties herein that the agency shall be bound hereunder only to the extent of the funds available or which may hereafter become available for the purpose of this agreement.
- E. AWARD OF CONTRACT:
1. Proposals will be evaluated based upon the information provided in the Offeror's Proposal using the criteria specified below and selection shall be made of two or more Offerors deemed to be fully qualified and best suited among those submitting proposals on the basis of the evaluation factors included in the Request for Proposal, including price, if so stated in the Request for Proposals. Negotiations shall be conducted with Offerors so selected. Price shall be considered, but need not be the sole determining factor. After negotiations have been conducted with each Offeror so selected, the agency shall select the Offeror which, in its opinion, has made the best proposal, and shall award the contract to that Offeror. The Commonwealth reserves the right to make multiple awards as a result of this solicitation. The Commonwealth may cancel this Request for Proposals or reject proposals at any time prior to an award, and is not required to furnish a statement of the reason why a particular proposal was not deemed to be the most advantageous. (*Governing Rules Section 49-D*). Should the Commonwealth determine in writing and in its sole discretion that only one Offeror is fully qualified, or that one Offeror is

clearly more highly qualified than the others under consideration, a contract may be negotiated and awarded to that Offeror. The award document will be a contract incorporating by reference all the requirements, terms and conditions of the solicitation and the Contractor's proposal as negotiated.

Notice of Award(s) or Notice of Intent to Award may be accessed electronically at <http://www.eva.virginia.gov> for a minimum of 10 days.

- F. **BEST AND FINAL OFFER (BAFO):** At the conclusion of negotiations, the Offeror(s) may be asked to submit in writing, a best and final offer (BAFO). After the BAFO is submitted, no further negotiations shall be conducted with the Offeror(s). The Offeror(s) proposal will be re-evaluated to combine and include the information contained in the BAFO. The decision to award will be based on the final evaluation including the BAFO.
- G. **PROPOSAL ACCEPTANCE PERIOD:** Any proposal in response to this solicitation shall be valid for ninety (90) days. At the end of the ninety (90) days, the proposal may be withdrawn at the written request of the Offeror. If the proposal is not withdrawn at that time it remains in effect until an award is made or the solicitation is cancelled.
- H. **PROPOSAL PRICES:** Proposal prices shall be in the form of a firm unit price for each item during the contract period
- I. **CANCELLATION OF CONTRACT:** The purchasing agency reserves the right to cancel and terminate any resulting contract, in part or in whole, without penalty, upon sixty (60) days written notice to the Contractor. In the event the initial contract period is for more than twelve (12) months, the resulting contract may be terminated by either party, without penalty, after the initial twelve (12) months of the contract period upon 60 days written notice to the other party. Any contract cancellation notice shall not relieve the Contractor of the obligation to deliver and/or perform on all outstanding orders issued prior to the effective date of cancellation.
- J. **CONTRACTOR LICENSE REQUIREMENT:** By my signature on this solicitation, I certify that this firm/individual and subcontractor is properly licensed for providing the goods/services specified.

Contractor Name: \_\_\_\_\_

Subcontractor Name: \_\_\_\_\_

License# \_\_\_\_\_ Type: \_\_\_\_\_

- K. **DRUG FREE WORKPLACE:** The Contractor acknowledges and certifies that it understands that the following acts by the Contractor, its employees and/or agents performing services on state property are prohibited:
  - 1. The unlawful manufacture, distribution, dispensing, possession or use of alcohol or other drugs; and
  - 2. Any impairment or incapacitation from the use of alcohol or other drugs (except the use of drugs for legitimate medical purposes).
  - 3. The Contractor further acknowledges and certifies that it understands that a violation of these prohibitions constitutes a breach of contract and may result in default action being taken by the Commonwealth in addition to any criminal penalties that may result from such conduct.

- L. ELECTRONIC DATA INTERCHANGE: University Purchasing has a great interest in utilizing Electronic Data Interchange (EDI) to improve efficiency of operation in the transmission of purchasing related information. Contractors are encouraged to provide a statement indicating their current EDI capabilities and/or future plans to establish/improve their EDI capabilities.
- M. EXTRA CHARGES NOT ALLOWED: The proposal price shall be for complete services ready for Commonwealth's use, and shall include all applicable freight and installation charges; extra charges will not be allowed.
- N. GOVERNANCE: The terms and conditions govern the contract and not any Contractor terms and conditions or services agreement.
- O. GRAMM-LEACH-BLILEY ACT:  
 The Contractor shall comply with the Act by implementing and maintaining appropriate safeguards to protect and prevent unauthorized release of student, faculty and staff nonpublic information. Nonpublic information is defined as social security numbers, or financial transactions, bank, credit and tax information.
- P. IDENTIFICATION OF PROPOSAL: The proposal package should be identified as follows:

From: \_\_\_\_\_

Name of Offeror	Due Date	Time
_____	_____	_____
Street or Box Number	RFP No.	
_____	_____	
City, State, Zip Code +4	RFP Title	
_____	_____	

Name of Contract Service Manager: John Kostyniuk, Construction Procurement Manager

The package should be addressed as directed on Page 2 of the solicitation.

If a proposal is not clearly identified, the Offeror takes the risk that the proposal may be inadvertently opened and the information compromised which may cause the proposal to be disqualified. Proposals may be hand delivered to the designated location in the office issuing the solicitation. No other correspondence or other proposals should be placed in the envelope.

LATE PROPOSALS: To be considered for selection, proposals must be received by the issuing office by the designated date and hour. The official time used in the receipt of proposals is that time on the automatic time stamp machine in the issuing office. Proposals received in the issuing office after the date and hour designated are automatically disqualified and will not be considered. The University is not responsible for delays in the delivery of mail by the U.S. Postal Service, private couriers, or the intrauniversity mail system. It is the sole responsibility of the Offeror to insure that its proposal reaches the issuing office by the designated date and hour.

- Q. INDEMNIFICATION: Contractor agrees to indemnify, defend and hold harmless the Commonwealth of Virginia, its officers, agents, and employees from any claims, damages and actions of any kind or nature, whether at law or in equity, arising from or caused by the use of any materials, goods, or equipment of any kind or nature furnished by the Contractor/any services of any kind or nature furnished by the Contractor, provided that such liability is not attributable to the sole negligence of the using agency or to failure of the using agency to use the materials, goods, or equipment in the manner already and permanently described by the Contractor on the materials, goods, or equipment delivered.
- R. INSPECTION OF JOB SITE: My signature on this solicitation constitutes certification that I have inspected the job site and am aware of the conditions under which the work must be accomplished. Claims, as a result of failure to inspect the job site, will not be considered by the Commonwealth.
- S. REFERENCES: Offerors shall provide a list of at least 3 references where similar goods and/or services have been provided. Each reference shall include the name of the organization, the complete mailing address, the name of the contact person and telephone number.

<u>ORGANIZATION</u>	<u>ADDRESS</u>	<u>CONTACT PERSON</u>	<u>TELEPHONE</u>
1. _____	_____	_____	_____
2. _____	_____	_____	_____
3. _____	_____	_____	_____

- T. SUBCONTRACTS: No portion of the work shall be subcontracted without prior written consent of the purchasing agency. In the event that the Contractor desires to subcontract some part of the work specified herein, the Contractor shall furnish the purchasing agency the names, qualifications and experience of their proposed subcontractors. The Contractor shall, however, remain fully liable and responsible for the work to be done by its subcontractor(s) and shall assure compliance with all requirements of the contract.
- U. WARRANTY (COMMERCIAL): The Contractor agrees that the supplies or services furnished under any award resulting from this solicitation shall be covered by the most favorable commercial warranties the Contractor gives any customer for such supplies or services and that the rights and remedies provided therein are in addition to and do not limit those available to the Commonwealth by any other clause of this solicitation. A copy of this warranty must be furnished with the proposal.
- V. WORK SITE DAMAGES: Any damage to existing utilities, equipment or finished surfaces resulting from the performance of this contract shall be repaired to the Commonwealth's satisfaction at the Contractor's expense.
- W. DAMAGE TO PUBLIC OR PRIVATE PROPERTY: Under this contract, the Contractor shall be responsible for making repairs, as necessary, to public or private property damaged by their work at the Contractor's sole expense. Pavement, curbs or sidewalk repairs shall be as specified by the City of Richmond VA, Department of Public Works for each separate location at which time such repairs may be required as a result of the contractor's operations under the Contract.

- X. CONVENIENCE TO GENERAL PUBLIC AND PROPERTY OWNERS: All work covered under this Contract shall be done in such a manner as to cause as little inconvenience as possible to the general public and property owners. All equipment and resulting material shall be placed along the route of the work so as not to inconvenience vehicular and pedestrian traffic. The Contractor shall provide adequate means to safely direct traffic past the point of construction and all other points that are affected by the work at all times. No closures shall be allowed unless specifically coordinated and approved. Access to property shall be maintained, and any time where there is a loss of access, the Contractor shall coordinate with VCU Department of Physical Plant. No payment will be made for the maintenance of traffic.
- Y. POLICY OF EQUAL EMPLOYMENT: Virginia Commonwealth University is an equal opportunity/affirmative action employer. Women, Minorities, persons with disabilities are encouraged to apply. The University encourages all vendors to establish and maintain a policy to insure equal opportunity employment. To that end, Offerors should submit along with their proposals, their policy of equal employment.
- Z. COMMUNICATIONS: Communications regarding this Request for Proposals (RFP) shall be formal from the date of issue for this RFP, until either a Contractor has been selected or the University Purchasing Department rejects all proposals. Formal communications shall be directed to the University Purchasing Department.

Informal communications including but not limited to, request for information, comments or speculations, regarding this RFP to any University employee other than a Purchasing Department representative may result in the offending Offeror's proposal being rejected.

AA. eVA BUSINESS-TO-GOVERNMENT CONTRACTS AND ORDERS: The solicitation/contract will result in purchase order(s) with the eVA transaction fee specified below assessed for each order.

1. For orders issued July 1, 2011 thru June 30, 2013, the Vendor Transaction Fee is:
  1. DSBSD-certified Small Businesses: 0.75%, Capped at \$500 per order.
  2. Businesses that are not DSBSD-certified Small Businesses: 0.75%, Capped at \$1,500 per order.
2. For orders issued July 1, 2013, and after, the Vendor Transaction Fee is:
  1. DSBSD-certified Small Businesses: 1%, Capped at \$500 per order.
  2. Businesses that are not DSBSD-certified Small Businesses: 1%, Capped at \$1,500 per order.

The specified vendor transaction fee will be invoiced, by the Commonwealth of Virginia Department of General Services, approximately 30 days after the corresponding purchase order is issued and payable 30 days after the invoice date. Any adjustments (increases/decreases) will be handled through purchase order changes.

The eVA Internet electronic procurement solution, website portal [www.eva.virginia.gov](http://www.eva.virginia.gov), streamlines and automates government purchasing activities in the Commonwealth. The portal is the gateway for vendors to conduct business with state agencies and public bodies.

Vendors desiring to provide goods and/or services to the Commonwealth shall participate in the eVA Internet e-procurement solution and agree to comply with the following: If this solicitation is for a term contract, may provide an electronic catalog (price list) or index page catalog for items awarded. The format of this electronic catalog shall conform to the eVA Catalog Interchange Format (CIF) Specification that can be accessed and downloaded from [www.eVA.virginia.gov](http://www.eVA.virginia.gov). Contractors should email Catalog or Index Page information to [eVA-catalog-manager@dgs.virginia.gov](mailto:eVA-catalog-manager@dgs.virginia.gov).

**BB. ELECTRONIC COPIES OF PROPOSALS:**

The successful Contractor may be required to provide the VCU Department of Procurement Services with a copy of the Contractor's entire original proposal (to include all attachments), and all subsequent correspondence (i.e. responses to requests for clarification and documents generated through the negotiation process) in an unsecured electronic format (i.e. email, disc – CD or DVD or flash drive). The Contractor SHALL NOT INCLUDE ANY PREVIOUSLY IDENTIFIED PROPRIETARY INFORMATION IN THE ELECTRONIC FORMAT; VCU will post the Contractor's original proposal, and all subsequent correspondence on the VCU Department of Procurement Services Website, VCU shall not be responsible for the Contractor's failure to exclude proprietary information submitted in the unsecured electronic format).

**CC. CONTRACT SUMMARY:**

The Contractor must provide to the University within fourteen (14) days after award of contract, an unsecured electronic summary of the contract. All the main features of the contract, including pricing, must be summarized. The contract summary will provide information for authorized users that choose to access the contract.

**DD. PROTEST:**

Any Offeror who desires to protest the award or decision to award a Contract shall submit the protest in writing to:

Director of Procurement Services  
Virginia Commonwealth University  
912 West Grace, 5<sup>th</sup> Floor  
Richmond, VA 23284

VCU will announce the award utilizing the Commonwealth of Virginia's e-Procurement system (eVA). The protest must be received no later than ten (10) days after the award or the announcement of the decision to award, whichever occurs first. However, if the protest of any actual or potential Offeror depends in whole or in part upon information contained in public records pertaining to the procurement transaction that are subject to inspection under the Rules Governing Procurement of Goods, Services, Insurance, and Construction by a Public Institution of Higher Education of the Commonwealth of Virginia Governed by Subchapter 3 of the Restricted Higher Education Financial and Administrative Operations Act., Chapter 4.10 (§23-38.88 et seq) of Title 23 of the Code of Virginia, §34, then the time within which the protest shall be submitted shall expire ten (10) days after those records are available for inspection by such Offeror under §34, or at such later time as provided in this section.

VCU Notices of Award(s) or Notices of Intent to Award may be accessed electronically at <http://www.eva.virginia.gov>.

No protest shall lie for a claim that the selected Offeror is not a responsible Offeror. The written protest shall include the basis for the protest and relief sought.

The VCU Director of Procurement Services shall issue a decision in writing within ten (10) days of receipt stating the reasons for the action taken. This decision shall be final unless the Offeror appeals within ten (10) days of receipt of the written decision by instituting legal action as provided in Section 54 of the Governing Rules.

Nothing in this clause shall be construed to permit a proposer to challenge the validity of the terms or conditions of the RFP. "Days" as used in this paragraph refer to calendar days. If a deadline falls on a Saturday or Sunday, the next business day shall be considered to be the deadline.

#### **XIV. SWAM COMMITMENT AND REPORTING REQUIREMENTS**

By submitting a Proposal, Offerors certify that all information provided in response to the Request for Proposals is true and accurate. Failure to provide information required by this Request for Proposals will ultimately result in rejection of the Proposal.

##### **SMALL, WOMEN-OWNED, AND MINORITY-OWNED BUSINESS COMMITMENT (SWaM):**

It is the policy of the Commonwealth of Virginia that 42% of its purchases be made from small businesses to contribute to the establishment, preservation, and strengthening of small businesses, and businesses owned by women and minorities, and to encourage their participation in VCU procurement activities. The Commonwealth encourages Contractors to provide for the participation of small businesses and businesses owned by women and minorities through partnerships, joint ventures, subcontracts or other contractual opportunities.

**Offerors must submit complete Appendix I (see section XVI) unless offeror is a DSBSD certified small business. DSBSD certified small businesses must include their certification number on the coversheet of this RFP, but are not required to complete Appendix I.**

**Use of Subcontractors:** If the Offeror intends to use subcontractors to perform any portion of the work described in this RFP, the Offeror must clearly so state. VCU is placing an increased emphasis on its SWaM (Small, Women, and Minority Owned) business program and is interested in identifying any potential opportunities that may be available to engage SWaM vendors to be certified by the Virginia Department of Small Business and Supplier Diversity (DSBSD) through new or existing contracts. **Identify and list any such opportunities that your firm would commit to if awarded this Contract in Appendix 1- Participation in VCU Procurement Transactions Small Businesses and Businesses Owned by Women and Minority.** The Offeror's response must include a description of which portion(s) of the work will be sub-contracted out and the names and addresses of potential Subcontractor(s) under the Contract.



## **SWaM REPORTING AND DELIVERY REQUIREMENTS:**

Unless the Contractor is a DSBSD certified small business, the Contractor shall submit quarterly reports on the direct involvement of Department of Small Business and Supplier Diversity (DSBSD) certified SWaM Businesses in the performance of the Contract. The report shall specify the actual dollars spent to date with Small Businesses, Women-Owned Businesses, and Minority-Owned Businesses based upon the Contractor's commitment for utilization of DSBSD SWaM Businesses.

The Contractor shall provide this information to:

Virginia Commonwealth University  
Procurement Services Office  
Attn: SWaM Coordinator  
912 W. Grace Street, POB 980327  
Richmond, VA 23284  
Email: [swamreporting@vcu.edu](mailto:swamreporting@vcu.edu)

Failure to submit the required information will be considered a contract compliance issue and will be addressed accordingly. In addition, failure to submit the required information will result in invoices being returned without payment.

## **XV. APPENDICES:**

Appendix I: SWAM Form

Appendix II: Invoicing and Payment Form

Appendix III: Exceptions

## **XVI. ATTACHMENTS:**

Attachment A: Pricing

Attachment B: Move Management Definitions

Attachment C: PHYSICAL PLANT Sample Surplus Inventory Form & Required Data

## APPENDIX I (SWaM Form)

### PARTICIPATION IN STATE PROCUREMENT TRANSACTIONS SMALL BUSINESSES AND BUSINESSES OWNED BY WOMEN AND MINORITIES

The following definitions will be used in completing the information contained in this Appendix.

#### Definitions

- **Small business** is 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. Nothing in this definition prevents a program, agency, institution or subdivision from complying with the qualification criteria of a specific state program or federal guideline to be in compliance with a federal grant or program.
- **Women-owned business** is a business concern which is at least 51 percent owned by one or more women who are U.S. citizens or legal resident aliens, or in the case of a corporation, partnership or limited liability company or other entity, at least 51 percent of the equity ownership interest in which is owned by one or more women, and whose management and daily business operations are controlled by one or more of such individuals.
- **Minority-owned business** is a business concern which is at least 51 percent owned by one or more minorities or in the case of a corporation, partnership or limited liability company or other entity, at least 51 percent of the equity ownership interest in which is owned by one or more minorities and whose management and daily business operations are controlled by one or more of such individuals.
- **Minority Individual:** “Minority” means a person who is a citizen of the United States or a legal resident alien and who satisfies one or more of the following definitions:
  - “Asian Americans” means all persons having origins in any of the original peoples of the Far East, Southeast Asia, the Indian subcontinent, or the Pacific Islands, including but not limited to Japan, China, Vietnam, Samoa, Laos, Cambodia, Taiwan, Northern Marinas, the Philippines, U. S. territory of the Pacific, India, Pakistan, Bangladesh and Sri Lanka and who are regarded as such by the community of which these persons claim to be a part.
  - “African Americans” means all persons having origins in any of the original peoples of Africa and who are regarded as such by the community of which these persons claim to be a part.
  - “Hispanic Americans” means all persons having origins in any of the Spanish speaking peoples of Mexico, South or Central America, or the Caribbean Islands or other Spanish or Portuguese cultures and who are regarded as such by the community of which these persons claim to be a part.

- “Native Americans” means all persons having origins in any of the original peoples of North America and who are regarded as such by the community of which these persons claim to be a part or who are recognized by a tribal organization.
- “Eskimos and Aleuts” means all persons having origins in any of the peoples of Northern Canada, Greenland, Alaska, and Eastern Siberia and who are regarded as such in the community of which these persons claim to be a part.

PARTICIPATION BY SMALL BUSINESSES, BUSINESSES OWNED BY WOMEN  
BUSINESSES OWNED BY MINORITIES

This appendix should only be completed by firms that are not Virginia Department of Minority Business Enterprise (DMBE) certified small businesses.

Offeror certifies that it will involve Small Businesses, Women-Owned Businesses, and/or Minority-Owned Businesses (SWAM) in the performance of this contract either as part of a joint venture, as a partnership, as Subcontractors or as suppliers.

List the names of the SWAM Businesses your firm intends to use and identify the direct role of these firms in the performance of the contract. State whether the firm is a Small Business (SB), Women-Owned (WO), or Minority-Owned (MO).

<u>Name of Businesses:</u>	<u>SB, WO, MO:</u>	<u>Role in contract:</u>
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**Commitment for utilization of DMBE SWAM Businesses:**

\_\_\_\_\_ % of total contract amount that will be performed by DMBE certified SWAM businesses.

**Identify the individual responsible for submitting SWAM reporting information to VCU:**

Name

Printed:

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Email:

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Phone:

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Offeror understands and acknowledge that the percentages stated above represent a contractual commitment by the Offeror. Failure to achieve the percentage commitment will be considered a breach of contract and may result in contract default.

Acknowledged:

By (*Signature*):

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Name Printed:

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Title:

---

Email:

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Note: Small, Minority and/or Women-owned business sub-contractors are required to become certified and maintain certification through the Virginia Department of Minority Business Enterprise (DMBE; <http://www.dmb.e.virginia.gov/swamcert.html> ) to fulfill the Offeror's commitment for utilization.

## Appendix II: Invoicing and Payment:

The Contractor shall submit a fully itemized invoice to Virginia Commonwealth University, Accounts Payable and Support Services, Box 980327, Richmond, VA 23298-0327, that, at minimum, includes the following information: the Virginia Commonwealth University purchase order number; a description of the goods or services provided; quantities; unit prices; extended prices; and total prices. Payment will be issued in accordance with the payment method selected below and with the Commonwealth of Virginia Prompt Payment Legislation. Upon request by VCU, the Contractor shall submit invoices electronically using the Ariba Network or other e-commerce channel utilized by VCU; and agrees to comply, within reason, with any future e-commerce initiatives including, but not limited to: procurement, procurement content, sourcing or any other electronic procurement and sourcing solutions. Questions regarding this method of invoicing should be sent to: [ecommerce@vcu.edu](mailto:ecommerce@vcu.edu).

Payment: VCU Procurement Services is automating the payment process to the greatest extent possible. Contractors are encouraged to accept payment electronically through the commercial card program. Please review the payment methods described below and select one for your firm. By selecting the payment method below, Contractor acknowledges that the selected payment method is **not specific to the contract resulting from this solicitation and will apply to all payments made to the Contractor** by Virginia Commonwealth University. For example, if the Contractor has an existing contract(s) and is currently receiving payment by paper check, and the Contractor is now electing to receive payment by the commercial card, **all payments** will be made using the commercial card once the commercial card payment process is implemented for the firm.

### Payment Methods

- **Electronically through a Wells Fargo Visa commercial card:** Payment will be made ten days (10) after receipt of a proper invoice for the amount of payment due, or ten (10) days after receipt of the goods or services, whichever is later. It is the Contractor's responsibility to contact its banking institutions to determine any credit limit that may restrict the payment of invoices. It is the Contractor's responsibility to have its credit limit raised as necessary to facilitate the timely payment of all invoices. Invoices exceeding the Contractor's credit limit will be returned unpaid. Failure to accept the commercial card after award of contract will be considered a contract compliance issue and will be addressed accordingly. In addition, invoices will be returned without payment until the Contractor can accept the payment through the commercial card
- **ACH:** Electronic payment via automated clearing house (ACH) to the vendor provided bank account of record. Payment is processed thirty (30) days after receipt of a proper invoice for the amount of payment due, or thirty (30) days after receipt of the goods or services, whichever is later. Additional information about ACH payments is available at: <http://treasury.vcu.edu/banking/vendor-ach/>.

**Contractor must indicate the method of payment selected:**

\_\_\_\_\_ Commercial Card Payment (Wells Fargo VISA)

\_\_\_\_\_ Automated Clearing House (ACH)

**Invoicing and Payment Method Acknowledgement:**

Signature: \_\_\_\_\_

Name Printed: \_\_\_\_\_

Title: \_\_\_\_\_

Name of Firm: \_\_\_\_\_

Date: \_\_\_\_\_

Please identify the following contact information for the individual who will serve as the appropriate point of contact within your company to be contacted by VCU Accounts Payable to implement the electronic invoicing and payment processes:

Name of the individual: \_\_\_\_\_

Title: \_\_\_\_\_

Mailing address: \_\_\_\_\_

\_\_\_\_\_

Email address: \_\_\_\_\_

Phone number: \_\_\_\_\_

Fax number: \_\_\_\_\_

### **Appendix III: Exceptions – see below.**

Any and all exceptions to the terms, conditions or specifications of this RFP must be clearly stated, section by section, in the space provided below. Exceptions should be numbered to coincide with the RFP numbering and be provided in the sequence in which the item appears in the RFP. If more space is required, please copy this page or attach separate sheets. Please note VCU, at its discretion, reserves the right to consider proposals containing significant exceptions to be non-responsive.

**ATTACHMENT A**  
**Pricing**

Hourly Rate	\$
Note the hourly rate is to include <b><u>all cost</u></b> (including but not limited to supervision, office supplies, transportation, miscellaneous and incidentals)	

Acknowledged:

By (*Signature*):

\_\_\_\_\_

Name Printed:

\_\_\_\_\_

Title:

\_\_\_\_\_

Email:

\_\_\_\_\_



## **ATTACHMENT B**

### **Move Management Definitions**

#### **VCU FMD**

Virginia Commonwealth University Facilities Management Division

#### **MOVE MANAGER**

The person assigned to be the primary point of contact from the consulting firm who will serve as the project lead to coordinate and oversee all aspects of the relocation project per the terms and conditions of the VCU contract for services.

#### **MOVE LIAISON**

The person assigned to be the primary point of contact for the client group(s) directly impacted by the relocation who will assist in providing the Move Manager information required for scope of work and schedule development.

#### **VCU PROJECT MANAGER**

The person assigned to be the primary point of contact from VCU FMD Planning & Design, VCU FMD Interior Design, VCU FMD Construction Management, VCU FMD Renovations or the VCU School of Medicine Director of Space Management who is responsible for the managing the overall project, project budget and project schedule. The VCU Project Manager will assist with the generating EP and work order requests.

#### **PROJECT DIRECTORY**

The project directory is to be generated and distributed to the project team by the Move Manager and is to include the names, company names, department names, email addresses and phone numbers for key project team members and vendors participating in the relocation project.

#### **MASTER SPREADSHEET**

The master spreadsheet is to be generated by the Move Manager to include all employees directly impacted by the relocation. It is to include employee names, department names, phone numbers, fax numbers, origin location, destination location and move date and/or phase.

## **DEFINITIONS (Continued)**

### **VCU SURPLUS FORM**

The VCU Surplus form is required to detail the inventory of items being delivered to the VCU Surplus warehouse. This form must be completed and signed by the client group for submittal to VCU Surplus in advance of the delivery date. The form will also require review and approval by the VCU Office of Environmental Safety if lab equipment items are included in the surplus inventory. [Sample attached.]

### **DAY ONE CHECKLIST**

The Move Manager may be required to provide a “Day One” or “Welcome to Your New Space” checklist for the purpose of addressing employee concerns or issues on the first day of occupancy. This document would be created by the move manager so that it conforms to the client’s specific needs and is distributed to staff just prior to the move. The Move Manager would address all concerns and issues during the scheduled help desk on their first day of occupancy. The checklist and help desk is not required for every relocation and is dependent on the client and size of the move.

### **MOVE MANAGER STATEMENT OF WORK**

The Move Manager Statement of Work is the VCU policy and procedures guide and is to be agreed upon and adhered to by the Move Manager contracted by VCU to provide relocation management services under the terms and conditions of this Request for Proposal.

### **QUICK FM**

<https://quikfm.vcu.edu/>

QuickFM is an on-line customer service portal for Facilities Management. This system is utilized by VCU students, faculty and staff to report facilities concerns and request services through VCU FMD. Once a request for services is placed, a work order number is issued into the Quick FM system for assignment to the appropriate support group and is subsequently utilized for tracking that service until completion.

## Attachment C

### PHYSICAL PLANT – SAMPLE SURPLUS INVENTORY FORM & REQUIRED DATA

AVAILABLE FOR DOWNLOAD: <http://www.fmd.vcu.edu/physicalplant/warehouse.html>



# VCU

VIRGINIA COMMONWEALTH UNIVERSITY

## Physical Plant Surplus/Move Form

This form is required before removal of surplus property

Department:	Date:
Location:	Phone #
Contact Person:	WR#
Fixed Asset Custodian (print)	Type of Lab:
Create a customer request through QuikFM at: <a href="https://quikfm.vcu.edu">https://quikfm.vcu.edu</a>	Customer Signature:

**FORWARD A COPY OF THIS FORM TO:**

- Department Asset Custodian
- [jmware@vcu.edu](mailto:jmware@vcu.edu)
- OEHS (required for laboratory departments)

**Regulated Materials:**

Principal Investigators are responsible for ensuring that employees are trained in the disposal of materials as defined in the VCU/MCVH/MCVP Safety Manual. Warehouse Management and General Services is not authorized to accept items containing or contaminated with biological, chemical, or radioactive materials. The responsible person for potentially hazardous items or equipment must contact OEHS Office to schedule an Equipment Clearance. Warehouse Management nor General Services will surplus or move items without documentation from OEHS. Physical Plant will report any violation to OEHS, and the transferring department will receive a charge for all cleanup.

**Hard Drive Data Removal Certification:**

All computers that are transferred to Warehouse Management must have all hard drive data removed either by wiping the drive with approved software or destroying the hard drive.

**Fluid Removal:**

It is the responsibility of the releasing department/customer to submit a QuikFM request to VCU Facilities Management Maintenance Zone to remove all liquids, to include but not limited to, Freon, fluids (oil, gasoline, diesel, hydraulic fluid) and lubricants.

VCU Surplus Administrator: \_\_\_\_\_ Date: \_\_\_\_\_





**VCU**

Procurement Services

**RFP-Addendum**

DATE: 9/22/2017

ADDENDUM NUMBER ONE (1), TO ALL OFFERORS

Reference-Request for Proposal: RFP# 7608269JK

Commodity/Title: Relocation Management Services

Issue Date: 9/5/2017

Proposal Due: 9/29/2017

Pre-Proposal Conference: Was held on 9/14/2017

The addenda includes the questions and answers along with the updated pricing attachment in eVA: See attached "Questions and Answers" and the pricing excel document in eVA title "Attachment A-Pricing"

NOTE: A signed acknowledgment of this addendum must be received by this office either prior to the proposal due date or attached to your proposal. Signature of this addendum does not constitute your signature on the original proposal document. The original proposal document must also be signed.

Very truly yours,  
John Kostyniuk  
804.828.5954

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Name of Firm

---

Signature/Title

---

Date



**VCU**

Procurement Services

## Questions and Answers

### **From Pre-Conference (Conference was held 9/14/2017):**

Question #1: While the RFP permits multiple awards, please confirm it is the preference of VCU to award to a single firm or entity to obtain economies of scale?

Answer # 1: As stated in RFP, The commonwealth reserves the right to make multiple awards as a result of this solicitation. Based on needs and preferences, we may need to award to multiple vendors.

Question # 2: When the Move Manager responds to the scope of services for each task order issued by the VCU Relocation Management Services Contract Administrator, please confirm the Move Manager will be expected to provide a firm fixed price for the defined scope.

Answer # 2: Vendor will provide an estimate for the total number of hours, not-to-exceed, then invoice actual hours accrued.

Question # 3: Could you please identify the estimate quote time for response on task orders?

Answer # 3: A quote is expected to be provided within one week of receiving the request.

Question # 4: Does VCU have established rates for the preferred move vendors or will rates need to be negotiated with each estimate?

Answer # 4: Moving companies have negotiated contract rates either via existing DGS contracts or VASCUUP contracts. The move manager does not negotiate move labor or packing material rates.

Question # 5: Item #2: Please clarify where the completed Page 2 of the RFP should be included in Offeror's response. Is inclusion in a separate section acceptable?

Answer # 5: A good example for responses is to return the entire RFP and sign and note sections where needed. For ex sign sheet two and fill out the entire section and then sign the special terms and conditions (for example references). If you print and acknowledge the entire RFP you should not miss anything.

Question # 6: Item #3: Please clarify where the signed Addenda, if required, should be included in Offeror's response. Is inclusion in a separate section acceptable?

Answer # 6: same as above, easiest to print and sign in order.



**VCU**

Procurement Services

Question # 7: Item #10: Please clarify the requirement that "Each paragraph in the proposal should reference the paragraph number of the corresponding section of the RFP." Would this requirement be satisfied if the offeror numbered each section answer to the RFP requirement on each page, rather than for each paragraph addressing that RFP paragraph?

Answer # 7: Please note the section and then the sub-sections in each, for example section VII (general Requirements), then A. planning and needs assessment, B furniture coord, C. Schedule, D. Vendor coord. Vendor response does not need every paragraph and bullet labeled and/or answered but please break down response and your plans to the sections. Vendor will want the reader to see and understand your response and how it ties into our needs.

Question # 8: Item #16: Please confirm that offerors are not required to return full terms and conditions and special conditions in Sections X and XI of the RFP with proposals; rather only exceptions are to be included as directed in Appendix III.

Answer # 8: The terms and conditions are set and you don't need to sign every one of them. Please note that any contract that is signed will reference these terms and conditions. If you have any exception(s) that you need VCU to be aware of, please note these in App III (note VCU at its discretion reserves the right to consider proposals containing significant exceptions to be non-responsive).

Question # 9: Please confirm that the goal of 42% of all contract dollars be provided to SWaM firms is an overall VCU requirement. As such, please confirm that each non-SWaM firm that serves as a prime contractor to VCU should strive to assist VCU in reaching this overall target as part of their efforts (e.g., primes are not required to subcontract 42% of contracted dollars to SWaM firms).

Answer # 9: You are not required to sub 42% but please note your % of swam subs. Please show your SWAM status as well. SWaM usage is 10% of the evaluation criteria and based on Offeror's status as a Virginia certified SWaM Business or the Offeror's plans to utilize Virginia DSBSD-certified SWaM Businesses in the Offeror's performance of the contract.

Question # 10: (SWaM Form) States: "Note: Small, Minority and/or Women-owned business sub-contractors are required to become certified and maintain certification through the Virginia Department of Minority Business Enterprise". May we include the



# VCU

## Procurement Services

names of firms that meet the SWaM requirements even if they are not certified by SWaM at the time of our proposal submission? The intent is that if we are selected, the identified subcontractors would become certified on a timely basis.

Answer # 10: Vendor will need to complete App I if not Department of Small Business and Supplier Diversity (DSBSD) certified and Small, Minority and/or Women-owned business sub-contractors are required to become certified and maintain certification through the Virginia Department of Minority Business Enterprise (DMBE; <http://www.dmb.e.virginia.gov/swamcert.html>) to fulfill the Offeror's commitment for utilization.

Question # 11: In responding to Attachment A "Pricing" please confirm that offerors can modify the form. For example, may offerors add rows to provide labor rates for multiple labor categories?

Answer # 11: Yes. Attached is a new pricing Attachment A with the new titles (Senior Move Manager, Move Manager, Move Manager Assistant and Interior Designer)

Question # 12: References – Are proposers permitted to contact a current VCU client contact regarding this RFP only to request permission to use them as a reference for this proposal?

Answer # 12: Yes-but as stated in the RFP, vendor can't have formal discussions around the RFP, you can talk past job(s) and try to get a reference. But vendor cannot discuss the ongoing RFP.

Question # 13: VCU Logo – Are proposers permitted to include the VCU logo in their submissions?

Answer # 13: Yes

Question # 14: Who is the current move manager performing the duties requested, and how long have they been in place?

Answer # 14: Numerous, VCU has seen: Erin Crane (hourly employee for 9.5 yrs from 2006-2015), FM solutions via DGS contract for two years and Heery International via a DGC contract for 3 months.

Question # 15: When can interested parties expect to receive responses to the questions that are due by 9/20?

Answer # 15: By 9/22 or Monday 9/25 at latest to allow time for response deadline on 9/29.





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Question # 16: Please provide an estimate of the average number of requests for move management services received per month and during peak periods (i.e. Winter/Spring breaks)?

Answer # 16: Can't provide solid number but we can say that for the fiscal year of 2016 that \$105,884.75 dollars' worth of EP's were issued in total EP's (issued by other departments or invoices paid by p-card).

Question # 17: What is the likelihood that other members of the VASCUPP will require move management services from the awardee?

Answer # 17: Can't guarantee, it will be available to the other schools on the [vascupp.org](http://vascupp.org) website, but VCU has no control over the amount they might use. Vendor can promote the contract to other schools if they would like. I can give you an example of my usage and that I use a VASCUUP contract for about 20% of my purchases.

Question # 18: Is there an existing furniture asset tagging system in place or will this be a new process that would begin with the move management contract award? If there is already a system in place, what kind of software is currently being used for this task?

Answer # 18: Existing tag system is in place. The move manager is only required to record asset tags found on inventoried items planned for surplus. Each department has a fixed asset custodian responsible for these items, whom the move manager would work with to ensure the information is accurately reported to surplus.

Question # 19: Will the awardee solely be responsible for space planning of existing furniture or will this be in conjunction with a VCU interior designer?

Answer # 19: The awardee will be responsible for space planning existing furniture being relocated and would work directly with the client group for plan review and approval.

Question # 20: Will the awardee be required to used AutoCAD, CAP 20/20, or other software programs to perform the requested tasks?

Answer # 20: Plans are typically provided via AutoCad or pdf format.

Question # 21: Does internal VCU staff handle small-scale moves submitted through Quick FM, or is the awardee expected to be involved in all move activity regardless of size/scope?

Answer # 21: VCU physical plant has an in-house staff who address most small-scale moves submitted via QuickFM. Typically, if the move is larger in scale, requires inventory/space planning, multi-phased and/or after-hours/weekend work, it will be assigned to a move management firm to coordinate.



# VCU

## Procurement Services

Question # 22: Please confirm that the awardee is required to price all move projects individually with estimated hours and receive approval before work commences.

Answer # 22: Yes

Question # 23: Will the awardee be responsible for writing the RFP for any move services?

Answer # 23: We will not put out bids and submit a new RFP once a contract is signed. VCU wants the vendor to write a plan for every move but I would not call that an RFP that is the move plan/schedule.

Question # 24: The RFP states (page 39) that the hourly rate be all-inclusive including supplies, transportation, incidentals, and supervision. Can you please provide clarification on how that information should be presented? For instance, should we list our hourly rate and each estimated incidental per move? Hourly rate, trip charge, accommodations/per diem, etc.?

Answer # 24: Basically it's your loaded labor rate.

Question # 25: Can other departments request via this contract not just move planning team?

Answer # 25: Yes all groups can use. VCU uses QuickFM and we will see if a request qualifies for move management due to volume, detailed inventory, space planning, multiple phases or after hours. If it come from QuickFM that will be coming from another department.

Question # 26: Can you post the attendance list of eVA?

Answer # 26: Yes. We had: Jones Lang LaSalle Inc, Heery International, KSA Interiors, Professional Moving & Storage, IBI Group, Creative, Gilbane Building Company, Procon Consulting, KGO, MGAC, Peck Peck + Associates, Graebel Commercial Services, FM Solutions, Projects Solutions and JK Moving.

Question # 27: After due date how long till close/sign contract?

Answer # 27: Can't give exact date but hopefully within 30 days. We have to review and since several players are involved I can't guarantee a date. I try/like to sign within 30 days but some go longer.

Question # 28: Once hired is the move manager required to be here or can they meet virtually?

Answer # 28: Will be project specific, some projects will be fine to do virtually but we like to have someone on campus. There could be some projects that require you to be on campus.



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## Procurement Services

Question # 29: Is there space for manager on campus?

Answer # 29: No. We can't provide space or parking.

Question # 30: Is the move manager required to be on VCU internal e-mail system?

Answer # 30: No

Question # 31: Will we have access to every building?

Answer # 31: Vendor will need to get a contractors badge (the cost is on the contractor and it was \$25). Vendor will need to get screening then depending on the project VCU will request access to that building or floor.

Question # 32: CAD files, do you have for every building?

Answer # 32: We should, the system that is currently used by our Planning & Design department to maintain all facility floor plans is called FM: Interact. It is a web based system in which floor plans are maintained in order of campus and building name. VCU does not allow outside firm access to this system. All requests for floor plans and autocad files for the purpose of space planning must be placed through the VCU Relocation Management Services Contract Administrator in the Office of Planning & Design.

**End of questions and answers from pre-conference.**

### **Additional Questions and Answers:**

Question # 33: Can the response include hourly costs for: Sr PM, PM, and project assistant instead of the single hourly cost requested on Attachment A?

Answer # 33: Attached is a new pricing Attachment A with the new titles (Senior Move Manager, Move Manager, Move Manager Assistant and Interior Designer)

Question # 34: Attachment A-Pricing: Please confirm that it is acceptable for the responding vendor to list multiple job titles/responsibilities with different hourly rates (i.e.: Project Manager, Move Manager, Move Coordinator).

Answer # 34: See above, attached is a new pricing Attachment A with the new titles (Senior Move Manager, Move Manager, Move Manager Assistant and Interior Designer)

Question # 35: VCU currently utilizes two vendors from the DGS contract (DGS Non-Professional Services-Construction Testing and Environmental Services Contract #DEB07012016MC). Once this VCU specific contract is awarded, will VCU Project



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## Procurement Services

Managers still be able to utilize vendors under the DGS contract or will the new contract be the sole vehicle for engaging Relocation Management specialists?

Answer # 35: This will be an optional use contract: The resulting contract(s) will be an optional use contract. VCU is in no way required to make purchases from the Contractor and may in its sole discretion purchase the identical and/or similar goods/services from other sources. Any estimates/quantities contained herein do not represent a purchase commitment by VCU

Question # 36: Is there an incumbent providing these services?

Answer # 36: VCU has used these sources: Erin Crane (hourly employee for 9.5 yrs from 2006-2015), FM solutions via DGS contract for two yrs and Heery International via a DGC contract for 3 months.

Question # 37: Page 2 of the RFP (middle section) states (in bold) "If proposals are hand delivered.....RFP #7635588JK....." Should this be RFP #7608269JK?

Answer # 37: Yes, that was a typo, this RFP is 7608269JK

Question # 38: How many projects do they anticipate per year?

Answer # 38: Can't provide exact numbers, but we can say that for the fiscal yr of 2016 that \$105,884.75 dollars' worth of EP's for move management was used at VCU. This does not include projects that may have been issued by other departments or invoices paid by p-card.

Question # 39: Please confirm the size of moves to be handled by the awardee (i.e. 5000 sf and above).

Answer # 39: Move size will be varied and cannot be quantified by square footage or headcount. As noted during the pre-bid, typical moves, adds and changes are handled by an in-house crew. Should a move require after-hours labor, multiple phases, detailed furniture or surplus inventory and/or space planning, move management services will be required.

Question # 40: Please confirm that you are requesting one (1) hourly rate for one (1) Relocation Manager only. Section IV, Page 5 states "The goal is to have a single point of contact", but Page 6 states "There may also be circumstances in which multiple renovation projects.....in which additional staffing would be required".

Answer # 40: See above, attached is a new pricing Attachment A with the new titles (Senior Move Manager, Move Manager, Move Manager Assistant and Interior Designer)

Question # 41: Do you request any key personnel resumes?

Answer # 41: Please include resumes and past experience

Question # 42: Does VCU currently have an asset management system?



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## Procurement Services

Answer # 42: Yes, an existing asset tag system is in place. The move manager is only required to record asset tags found on inventoried items planned for surplus. Each department has a fixed asset custodian responsible for these items, whom the move manager would work with to ensure the information is accurately reported to surplus.

Question # 43: Will furniture inventories include systems furniture parts/pieces (i.e. panels, brackets, work surfaces, etc)?

Answer # 43: No. That service is typically provided by a furniture dealer.

Question # 44: Would the awarded contractor need to provide a "help desk" on Day One of move back?

Answer # 44: Yes, but this requirement will be on a project by project basis. Not all moves will require this service. VCU will specify whether or not it will be required at the time the move management proposal is requested.

Question # 45: What is the timeframe on the NTP for each task order?

Answer # 45: The typical turnaround time on the move management services proposal review and approval could range anywhere from 48 hours to several weeks depending on the project.

Question # 46: Could some meetings be handled via phone/video vs. all in person?

Answer # 46: Will be project specific, some projects will be fine to do virtually (but VCU would prefer to have someone on campus). There could be some projects that require you to be on campus. Most meetings will require the move manager to attend in person. If the project is large in scale and duration, then yes, conference call attendance would be acceptable for the project status update meetings.

Question # 47: Will there be a special requirement for handling the relocation of the biosafety equipment?

Answer # 47: Biosafety cabinets require decontamination services before the move and inspection/certification after the move. The principal investigator should coordinate these services, however, some projects may require the move manager coordinate directly with the vendor in conjunction with the move, i.e. request an estimate for services, place a purchase order request via the client and coordinate the vendor's schedule.

Question # 48: Special Terms and Conditions, Item: U. Warranty (Commercial): Please describe what warranties the vendor/contractor would be providing under this contract? As a professional consulting services firm, we do not issue commercial warranties to clients/customers. Would a statement regarding our most favorable rates be sufficient to fulfill this requirement of the RFP? If not, should we list this as an exception to the contract?





# VCU

## Procurement Services

Answer # 48: If you are ever required to provide a product or service that would have a warranty, we would require the most favorable rate offered (either by you or the manufacturer of the product).

Question # 49: In the pre-proposal conference, VCU had noted that, as far as price proposal goes, the University is expecting a loaded rate that includes administrative work as well as printing services. The printing services would be difficult to integrate within an hourly labor rate since the amount/type of printing for each project could vary greatly. Does VCU indeed intend for each proposer to include printing services within the hourly labor rate or may the successful proposer(s) included printing as a separate, estimated line item within each subsequent task order proposal?

Answer # 49: Requirements of the move manager can include but are not limited to detailed: plans, inventory, instructions, and conditions. These detailed tasks will be dictated by the relocation project scope of work and VCU Project Manager's or Client Group's request for services we are requiring. VCU knows that printing services could vary greatly depending on the project size. If needed a vendor could provide this on the project quote/estimate and the contract administrator would approve/deny. Please note that vendors quote(s) for additional products or services will be for cost only and all invoices will need actual receipts. Receipts for additional products or services shall be provided on every invoice.

Question # 50: Since yearly escalation of rates to address inflation was not mentioned in the RFP, are we to assume that the same rates will apply throughout each year of the contract, including the four optional renewal years, or may we propose different rates for the base year and option years?

Answer # 50: This contract may be renewed by the Commonwealth for four (4) additional, consecutive one (1) year terms. Price increases may be negotiated only at the time of renewal. Written notice of the Commonwealth's intention to renew should be provided approximately 60 days prior to the expiration date of each contract period.

Question # 51: Is it anticipated that the Move Manager would hold any specialty subcontracts such as furniture installation or lab equipment servicing, hazardous materials/chemical movers etc. or will all subcontracts for specialty vendors be held by VCU?

Answer # 51: Most specialty subcontracts will be held by VCU, including but not limited to: furniture installation, lab equipment servicing, hazardous materials/chemical movers.

Question # 52: We understand that we are bound to achieve our committed SWaM %. With that in mind, we believe that the use of some specialized subcontractors will depend on the specific needs identified in the individual task order scope of work and therefore we feel we cannot guarantee we will use these named subcontractors. May



# VCU

## Procurement Services

we identify and describe subcontractors that we expect to use for specific needs as per our assumptions, without providing an absolute commitment to use the named subcontractors?

Answer # 52: Yes, We ask that if the Offeror is not SWaM certified to give us your plans to utilize Virginia DSBSD-certified SWaM Businesses in the Offeror's performance of the contract. If you are not a DSBSD certified small business you must submit/complete Appendix I. If the Offeror intends to use subcontractors to perform any portion of the work described in this RFP, the Offeror must clearly so state. VCU is placing an increased emphasis on its SWaM (Small, Women, and Minority Owned) business program and is interested in identifying any potential opportunities that may be available to engage SWaM vendors to be certified by the Virginia Department of Small Business and Supplier Diversity (DSBSD) through new or existing contracts. Identify and list any such opportunities that your firm would commit to if awarded this Contract in Appendix 1- Participation in VCU Procurement Transactions Small Businesses and Businesses Owned by Women and Minority. The Offeror's response must include a description of which portion(s) of the work will be sub-contracted out and the names and addresses of potential Subcontractor(s) under the Contract. Unless the Contractor is a DSBSD certified small business, the Contractor shall submit quarterly reports on the direct involvement of Department of Small Business and Supplier Diversity (DSBSD) certified SWaM Businesses in the performance of the Contract. The report shall specify the actual dollars spent to date with Small Businesses, Women-Owned Businesses, and Minority-Owned Businesses based upon the Contractor's commitment for utilization of DSBSD SWaM Businesses. Failure to submit the required information will be considered a contract compliance issue and will be addressed accordingly. In addition, failure to submit the required information will result in invoices being returned without payment.

Question # 53: In the event we have multiple subcontractors to meet the SWaM %, do we need to name the full list in this portion?

Answer # 53: Yes-If the Offeror intends to use subcontractors to perform any portion of the work described in this RFP, the Offeror must clearly so state. VCU is placing an increased emphasis on its SWaM (Small, Women, and Minority Owned) business program and is interested in identifying any potential opportunities that may be available to engage SWaM vendors to be certified by the Virginia Department of Small Business and Supplier Diversity (DSBSD) through new or existing contracts. Identify and list any such opportunities that your firm would commit to if awarded this Contract in Appendix 1- Participation in VCU Procurement Transactions Small Businesses and Businesses Owned by Women and Minority. The Offeror's response must include a description of which portion(s) of the work will be sub-contracted out and the names and addresses of potential Subcontractor(s) under the Contract.

**End of additional questions.**



**VCU**

Procurement Services

**RFP-Addendum**

DATE: 11/30/2017

ADDENDUM NUMBER TWO (2), TO 7608269JK

Reference-Request for Proposal: RFP# 7608269JK

Commodity/Title: Relocation Management Services

Issue Date: 9/5/2017

Proposal Due: 9/29/2017

Pre-Proposal Conference: 9/14/2017

The addenda includes additional Terms and Conditions for RFP 7608269JK

NOTE: A signed acknowledgment of this addendum must be received by this office. Signature of this addendum does not constitute your signature on the contract. The original contract document must also be signed.

Very truly yours,  
John Kostyniuk  
804.828.5954

JLL

---

Name of Firm

Ilana Breslaw VP | Sr. Variable Resource Team Lead

Signature/Title

December 5, 2017

---

Date





**VCU**

Procurement Services

These additional Terms and Conditions shall be added to Section XIII. Special Terms and Conditions of RFP 7608269JK:

Force Majeure: Either party will not be responsible for any losses resulting from delay or failure in performance resulting from any cause, event, or occurrence beyond the control, and without negligence of, the parties. Such events, occurrences, or causes include, without limitation: war, strikes or labor disputes, civil disturbances, fires, natural disasters, and acts of God

Sovereign immunity: VCU is an agency of the Commonwealth of Virginia and is afforded the protection of sovereign immunity under Virginia law. Any claims against VCU or the Commonwealth are subject to the requirements established under Virginia law for bringing such claims against VCU or the Commonwealth, including the Virginia Tort Claims Act (Va. Code §§ 8.01-195.1 et seq.) and other applicable statutes relating to claims against the Commonwealth or its agencies. Notwithstanding any other provision, nothing in this contract shall be deemed to be or construed as a waiver of VCU's or the Commonwealth's sovereign immunity, or any other applicable requirements under Virginia law for bringing claims against VCU or the Commonwealth.

LIMITATION OF LIABILITY: To the maximum extent permitted by applicable law, the Contractor will not be liable under this contract for any indirect, incidental, special or consequential damages, or damages from loss profits, revenue, data or use of the supplies, equipment and/or services delivered under this contract. This limitation of liability will not apply, however, to liability arising from: (a) personal injury or death; (b) defect or deficiency caused by willful misconduct or negligence on the part of the Contractor; or (c) circumstances where the contract expressly provides a right to damages, indemnification or reimbursement. The total cumulative liability of the Commonwealth, its officers, employees and agents in connection with this Agreement or in connection with any goods, services, actions or omissions relating to this Agreement, shall not under any circumstance exceed payment of the maximum purchase price. Regardless of any provision herein, Jones Lang LaSalle Americas, Inc. shall be liable for all personal injury and property damage resulting from Jones Lang LaSalle Americas, Inc., its agents, officers, directors, and affiliates negligence, gross negligence, or willful misconduct.



**VCU**

Procurement Services

**PRIME CONTRACTOR RESPONSIBILITIES:** The Contractor shall be responsible for completely supervising and directing the work under this contract and all subcontractors that he may utilize, using his best skill and attention. Subcontractors who perform work under this contract shall be responsible to the prime Contractor. The Contractor agrees that he is as fully responsible for the acts and omissions of his subcontractors and of persons employed by them as he is for the acts and omissions of his own employees

**MINORITY/WOMEN-OWNED BUSINESSES SUBCONTRACTING REPORTING REQUIREMENTS AND GOALS:** Where it is practicable for any portion of the awarded contract to be subcontracted to other suppliers, the Contractor is encouraged to offer such business to minority and/or women-owned businesses. Names of firms may be obtained from the buyer handling this solicitation and/or from the Division of Purchases and Supply. When such business has been subcontracted to these firms and upon completion of the contract, the Contractor agrees to furnish the purchasing office the following information: name of firm, phone number, total dollar amount subcontracted and type of product/service provided.



# VIRGINIA COMMONWEALTH UNIVERSITY

PROCUREMENT SERVICES

RELOCATION MANAGEMENT SERVICES

SEPTEMBER 28, 2017

RESPONSE TO REQUEST FOR PROPOSAL

**Solicitation No.:** 7608269JK

September 28, 2017

John Kostyniuk, Construction Purchasing Manager  
Virginia Commonwealth University  
912 W Grace St, 5th floor  
Richmond, Virginia 23284-0327

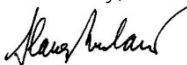
## Re: Proprietary and Trade Secret Information

Dear Mr. Kostyniuk,

In accordance with Request for Proposals 7608269JK, Section IX(9) and Code of Virginia § 2.2-4342(F), Jones Lang LaSalle Americas, Inc. (JLL) herein provides notice that the attached proposal includes information proprietary to JLL. The following information is identified as proprietary; that information is highlighted and redacted in the second version of the proposal documentation:

1. Case Studies (Section 1, Page 3-13). JLL considers its client list and case studies to be proprietary to JLL and confidential to JLL clients. JLL provides references for VCU's use and information, but our client relationships constitute economic value, and publication of our clients and contracts could cause economic harm.
2. Presentation Technique (Section 1, Page 3), (Section 2, Page 19), (Section 2, Page 21-22) (Section 2, Page 24) (Section 2, Page 26), (Section 2, Page 30), (Section 2, Page 33), (Section 2, Page 35), (Section 2, Page 38) (Section 2, Page 43). JLL considers select proposal presentation techniques to be unique to JLL and represents economic value as a competitive advantage.
3. Project response (Section 2, Page 14). JLL considers its technical approach technique and strategy to be unique to JLL and represents economic value as a competitive advantage. Our approach is not generally known to the public and disclosure would eliminate this competitive advantage and cause economic harm.
4. References (Section 3, Page 44). JLL considers its references to be proprietary to JLL and confidential to JLL clients. JLL provides references for VCU's use and information, but our client relationships constitute economic value, and publication of our clients and contracts could cause economic harm.
5. Current & Projected Work Load (Section 5, Page 45). JLL considers its work load to be proprietary to JLL and confidential to JLL clients.
6. Resumes (Appendix C, Page 69-80). JLL considers its resumes to be proprietary to JLL and confidential to JLL employees.
7. SWaM Form (Section 6, Page 48). JLL considers its SWaM firms to be unique to JLL and represents economic value as a competitive advantage.

Sincerely,



Ilana Breslaw

VP | RPM Sr. Team Lead

JLL, PDS|RPM Services

+1 301-399-8050, [Ilana.Breslaw@am.jll.com](mailto:Ilana.Breslaw@am.jll.com)

**VIRGINIA COMMONWEALTH UNIVERSITY**  
PROCUREMENT SERVICES



**RELOCATION MANAGEMENT SERVICES**

---

**Response to Request for Proposal RFP #: 7608269JK**

**Due:** September 29, 2017 by 3PM

**Prepared for:**

John Kostyniuk, Construction Purchasing Manager  
Virginia Commonwealth University  
912 W Grace St, 5th floor  
Richmond, Virginia 23284-0327  
Phone: 804-828-5954  
Email: kostyniukjs@vcu.edu

**Prepared by:**



**Contact:**

Ilana Breslaw  
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+1 301-399-8050  
[Ilana.Breslaw@am.jll.com](mailto:Ilana.Breslaw@am.jll.com)

TRADE SECRET/COMPANY PRIVATE – DO NOT DISCLOSE – This proposal includes data that shall not be disclosed outside the Government/Organization and shall not be duplicated, used or disclosed—in whole or in part—for any purpose other than to evaluate this proposal. If, however, a contract is awarded to this offer as a result of—or in connection with—the submission of this data, the Government/Organization shall have the right to duplicate, use or disclose the data to the extent provided in the resulting contract. This restriction does not limit the Government/Organization's right to use information contained in this data if it is obtained from another source without restriction. The data subject to this restriction is contained within the proposal and each page is marked accordingly.

September 28, 2017

John Kostyniuk  
Virginia Commonwealth University  
912 W Grace St, 5th floor  
Richmond, Virginia 23284-0327

**Re: Response to Request for Proposal/Qualification RFP #: 7608269JK**

Dear Mr. Kostyniuk,

**Thank you for the opportunity to present this proposal to Virginia Commonwealth University (VCU).**

As an experienced group of subject matter experts in move management, JLL will act as a single source for all of your relocation needs including: move planning, implementation, post-move service, project and team management, vendor bid evaluation, scheduling and budgeting needs. JLL will put a special emphasis on high levels of communication and coordination with the VCU Project Manager and all VCU internal service groups as well as external vendors. Paramount to our successful services is detailed planning, client process compliance and execution resulting in maximum client support and minimal disruption.

It is our understanding that VCU is seeking a project management team to coordinate and manage “as-needed” move management services for a variety of projects ranging from small renovations to major capital projects - including new construction. Our proposal is based upon requirements gained in a thorough review of your RFP as well as our understanding acquired by attending the pre-bid meeting on September 14, 2017.

JLL proposes an outstanding project team, experienced in higher education move management that correlates well with the requirements of VCU. JLL is flexible in our mode of delivery, allowing you to scale the scope against your project priorities, budget availability, and internal capabilities.

Our references support that fact that we have provided white glove services to highly demanding clients requiring services that are similar to those required by VCU. We would be honored to provide critical move manage services to VCU.

Sincerely,



Ilana Breslaw  
VP | RPM Sr. Team Lead  
JLL, PDS|RPM Services  
+1 301-399-8050  
[Ilana.Breslaw@am.jll.com](mailto:Ilana.Breslaw@am.jll.com)



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## Section 1: Company qualifications and experience

### About JLL

Jones Lang LaSalle America, Inc. (JLL) is a leading professional services firm that specializes in real estate services and investment management. A Fortune 500 company, JLL helps real estate owners, occupiers and investors achieve their business ambitions. In 2016, JLL had revenue of \$6.8 billion and fee revenue of \$5.8 billion and, on behalf of clients, managed 4.4 billion square feet, and completed sales acquisitions and finance transactions of approximately \$145 billion. At the end of the second quarter of 2017, JLL had nearly 300 corporate offices, operations in over 80 countries and a global workforce of nearly 80,000. JLL is the brand name and a registered trademark, of Jones Lang LaSalle Incorporated. For further information, visit [ir.jll.com](http://ir.jll.com).

### Our mission and philosophy

Our mission is to deliver exceptional, strategic, fully integrated services, best practices and innovative solutions for real estate owners, occupiers, investors and developers worldwide.

We believe in uncompromising integrity and the highest ethical conduct. We are proud of the global reputation we have earned and are determined to protect and enhance it. The integrity our brand represents is one of our most valuable assets and is as a strong differentiator for our company.

### Industry recognition and awards

JLL is recognized worldwide for its superior service delivery, strong business metrics, high ethical standards and its demonstrated commitment to sustainability initiatives. A 2017 recipient of the ENERGY STAR® Sustained Excellence Award by the U.S. Environmental Protection Agency, we also were named to FORTUNE Magazine's "World's Most Admired Companies" and "America's Best Employers" in 2017. We are also proud to be named the 2015 "Best of the Best" Top Diversity Employer and 2015 Top Supplier Diversity Program by the Black EOE Journal as well as Hispanic Network Magazine. Each year since 2010, the International Association of Outsourcing Professionals® has named JLL among the best service providers across all industries on its annual Global Outsourcing 100® list—including "Super Star" status in 2016, in which we earned the highest possible ranking in each of the judging categories. In the area of technology, JLL's Innovation and Product Development platform received two awards from CoreNet in 2016—the Global Professional Excellence Award celebrating innovation in management and work processes enabling world-class business performance, and the prestigious H. Bruce Russell Global Innovator's Award, recognizing excellence and innovation in corporate real estate as voted by leading global real estate firms. Being recognized in this way by the corporate real estate industry's leading body is a testament to the strength and uniqueness of our platform.



8<sup>th</sup> consecutive year



10<sup>th</sup> consecutive year



6<sup>th</sup> consecutive year



3 years in a row (2014–2016)



Also won in 2013, 2015, 2016



For 10 consecutive years, JLL has been named to the Ethisphere Institute's "World's Most Ethical Companies" list, which recognizes companies for their commitment to ethical business practices. The list is comprised of 100 companies in more than 100 countries and 36 industries, selected from nominations from thousands of companies. JLL not only requires employees to review and sign a code of business ethics each year, but our legal team has developed a public sector code of ethics to address specific issues in working with governmental entities. Four times since 2013, we have been selected as one of the 100 best corporate citizens by Corporate Responsibility (CR) Magazine.

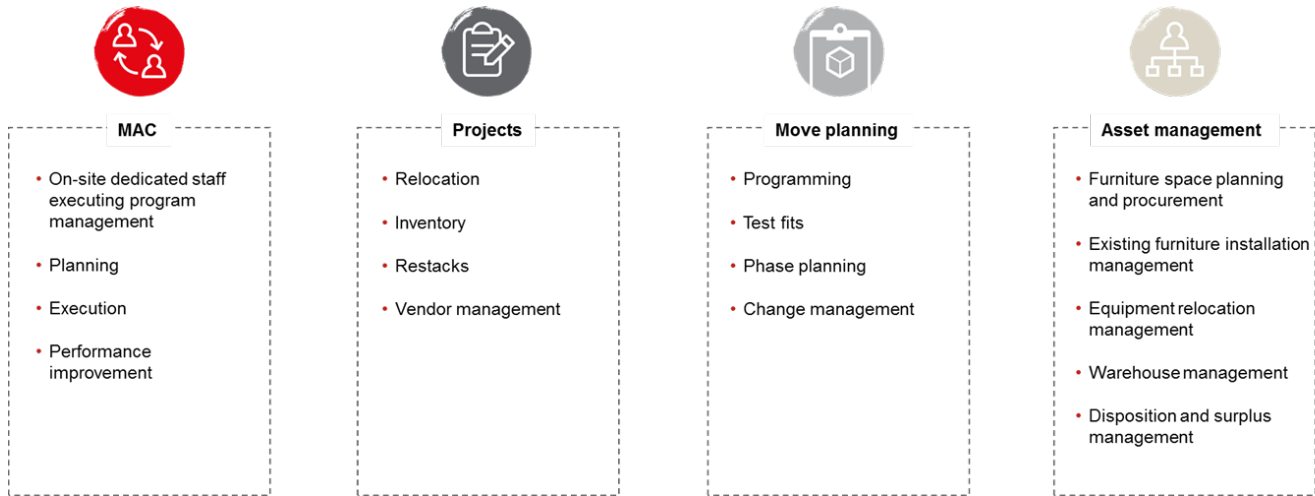
### **Relocation Project Management (RPM) overview**

JLL has 40 years of Relocation Project Management (RPM) experience, providing the most comprehensive RPM services in the industry. We are the largest provider of RPM services in the nation with more than 375 RPM employees who serve 70 clients including numerous higher education and institutional clients. We have the strongest communities of practice and platform – moving more than 500,000 people annually. We've made a strong commitment to build and grow our RPM stand-alone service. In July of 2016, JLL acquired BRG (who acquired Fox RPM Corp.), which expanded our experience and increased dramatically our senior resources. The combination of these three firms creates a powerhouse in RPM unparalleled by any firm in the country.

JLL has a total of 46 RPM professionals in the Virginia, Maryland and D.C. tristate area. Headquartered in Washington D.C., our local teams manage projects throughout the Mid-Atlantic Region. Specific to Richmond, VA, JLL has an established an office in Boulder's Park from which JLL provides brokerage and move management. Among its growing client base are accounts such as: Capital One, Dominion Electric and Virginia Urology. While JLL has on-site move management teams at Capital One and Dominion Electric, JLL also has Richmond based variable resources in the relocation management arena, readily available for VCU project work. In addition, JLL has nine project managers who reside at the client site at VCU Health System managing over one billion dollars of combined health care work (with two project managers (PM's) traveling to South Hill for the VCUHS Hospital and MOB projects. JLL also has offices in Norfolk and Charlottesville that provide support to the Richmond office.

We rely on flexible yet proven processes to incorporate our clients' unique needs and requirements into a seamless move and successful outcome. We seek to align our capabilities and resources to those understood needs resulting in the smooth, orderly and timely relocation of operations and personnel while minimizing disruptions and/or damage to equipment and property. All our relocation Project Managers are meticulously organized, detail-oriented, and capable of delivering "high-touch" service and rely on their strong communication skills. JLL takes full ownership for every aspect of client's relocation scope, ranging from space planning, pre-move strategy development, furniture and filing needs, move communications and change management to move execution oversight and post move assistance. Our success over the years has been the result of seeing ourselves as a direct extension of our client's team.

Our RPM services



Our education and research experience

Client	Services (RPM, PDS, etc.)	Volume of work (SF, Number of properties, location types)
U.S. Securities Exchange Commission	RPM	Project type: Long-term client since 1997; long-term BPA contract; services: space planning, furniture procurement, on-site installation management nationwide; M+ SF portfolio; 5,000+ people moved  Specialty space: Labs, high density file rooms; hearing rooms, training centers
Northrup Grumman	RPM, IFM, PDS, TM, OP	Project type: Client since 2006; engaged in a third, five year contract to provide all daily and project moves; moved over 6,800 people in the 16M + SF portfolio  Specialty space: Main campus, remote labs, training facilities, warehouse and secured compartmentalized facilities
Defense Information System Agency	RPM	Project type: 1.1M SF HQ Space; five year comprehensive furniture outfitting management and relocation contract; 2,500 people moved in one week for HQ restack; ongoing management and response to daily help desk work orders furniture warranty management, furniture and warehouse management, furniture procurement  Specialty space: SCIF, labs, and warehouse spaces
National Cancer Institute	RPM	Project type: Second five year contract since 2012; 1.8M SF portfolio; 7,000+ people moved; \$8,918,000 value; services: daily churn, specialized performance: transfer of 2.5M tissue blocks/slides into high density storage; emergency response due to power failures  Specialty space/work: Research labs, pathology, libraries, HD storage, administrative/HQ

College of William and Mary	RPM	<p>Project type: Multiple projects with multiple move phases; science and liberal arts/teaching, administrative and research facilities; 180,000 SF multiple sites project, 8 departments; FF&amp;E procurement utilizing eVA. Surplus and warehouse management</p> <p>Specialty spaces: herbarium, green house, advanced computing, research labs.</p>
The George Washington University	RPM	<p>Project type: Science and Engineering Hall; 507,000 S; two phase relocation project consolidating ten sites into one facility</p> <p>Specialty spaces: 140 labs, 20 teaching labs, and over 300 faculty offices</p>
Gallaudet University	RPM	<p>Project type: Multiple projects and phases; Total ~ 120,000 SF, 8 STEM departments; provost's and dean's offices; refurbishments of dormitories; swing moves, furniture space planning and re-use, installation, warehouse management and furniture surplus</p> <p>Specialty Spaces: STEM/research labs, administration and teaching environments, dormitories</p>
Apollo Group (University of Phoenix)	RPM, IFM, PDS, OP, TM	<p>Project type: Five year relocation and asset management contract where daily and large project moves are performed; scope includes 4M SF portfolio, approximately 2,000 project moves/year</p> <p>Specialty spaces: Diverse, multi-tenant buildings, leased spaces with diverse building regulations</p>
Harvard University	RPM	<p>Project type: long-term client since 1998; 40 university facilities of all types</p> <p>Specialty spaces: Labs, pharmacy, behavioral health center, museums, student housing, academic—teaching buildings, member services, urgent care/pediatrics, rare book collections</p>
Northeast University	RPM	<p>Project type: Single relocation project transferring a laboratory environment from VCU to Northeastern University's new facility (Boston, MA)</p> <p>Specialty space: Laboratory with 12 researchers</p>
Department of Homeland Security	RPM	<p>Project type: A second five year contract term \$8M value; managing all relocations for DHS in the DC metro area.; daily work orders from small to large project moves of over 600 people in a single weekend</p> <p>Specialty spaces: 55 buildings, SCIFS; warehouse, high tech environments; server rooms</p>
DC forensics lab	RPM	<p>Project type: Multi-phase single project into new facility; scope: 287,000 SF new facility, 13 phases, 104 service vendors occupants - four distinct agencies, DC forensics lab, city health labs, Office of Chief Medical Examiner, Office of Health Statistics &amp; Management</p> <p>Specialty spaces: Diagnostics labs, pathology, morgue</p>

Maryland State Health Lab	RPM	<p>Project type: Multi-phase single project into new facility; duration: 23 months; state health lab relocation into a 234,000 SF new facility, 250 personnel, 1890 new and reuse equipment items managed</p> <p>Specialty spaces: Analytical labs, BSL-3 high containment, pathology, morgue</p>
U.S. Department of Health and Human Services (HHS)	RPM	<p>Project type: Administrative total space over 2M SF; two year project with multiple move phases (36 move phases of ~200 people/phase); use-furniture repurposing, reinstallation and surplus; swing moves; disposition and decommissioning of four facilities; total number of people moved 4,000 with 50% moved twice; coordination with 10 divisions and over 30 departments</p> <p>Specialty space: Administrative/hoteling, warehouse, HD storage and file management, mailroom, server rooms</p>

### Case Study #1: Harvard University

Project: Harvard University ongoing RPM services contracts

Client since: 1998

Location: Cambridge, MA

Portfolio size: JLL has provided RPM services for more than 40 university facilities of various types

Specialty space: Labs, pharmacy, behavioral health, museums, student housing, academic—teaching buildings, member services, urgent care and pediatrics, and rare book collections

**HARVARD**  
UNIVERSITY



#### Summary of work

Harvard has engaged JLL to perform approximately 80 relocation task orders during our 20 year period of ongoing contracts. The scope of work includes comprehensive relocation planning and management, acting as an extension of the University’s design and project management group. Representative areas supported by JLL include labs, museums, student housing, academic teaching, and other university support organizations identified below. Task orders range from moving as few as 15 people and associated assets to turnkey relocation services for a 460,000 SF multi-phase move to a new research center. Representative university groups include:

- Harvard Public Affairs and Communications
- Global Support Services
- Office of Human Resources
- Office of the General Council
- Title IX Office
- Harvard Office of Student Housing
- School of Engineering and Applied Sciences
- Faculty of Arts and Sciences
- University Ombudsman Office
- Harvard University Health Services
- Harvard Dental services
- Harvard University Center for Wellness
- Harvard Visitor’s Center

## Harvard Sackler Building

JLL provided “white glove” relocation management services to move the rare and valuable book collections, Art History and Architecture department, the Graduate School of Design studio space, and the digital images and slides collection. At approximately 56,000 SF, the Sackler Building project required extensive planning and attention to the sensitive, valuable and rare materials.



### Challenges

- Providing the highest level of service in a fast track project situation
- Compressed schedule (less than five months) to plan, pack, move and unpack by 2017 Commencement
- Fitting faculty collections into smaller interim offices
- Packing the faculty and collections
- Interim (“swing”) space at multiple locations
- Disposition of remaining items

### Results

- Successful move of unique collections – over 3,000 LF of rare books and valuable collections were inventoried and moved to offices or storage locations
- Close working relationships with clients and custom solutions to meet each group’s specific needs
- Coordinating multiple stakeholders
- Engagement of additional internal relocation experts to seamlessly support a large and critical move
- Completion in less than five months

## Harvard Smith Campus Center

When the University embarked on a multi-year plan to renovate and expand the Harvard Smith Campus Center and Harvard Health Services, it engaged JLL to provide move management for numerous individual projects ranging from 30,000 - 60, 000 SF.



### Challenges

- Compressed time frame
- Verizon strike that affected and delayed phone moves
- Pharmacy and Dental Services required special equipment and regulated handling of materials

### Results

- Flexible planning and execution of complex moves, with complex communication procedures
- Use of variable staff to manage the unpredictable construction schedule to keep renovation on track

- Meeting deadline despite the unexpected Verizon strike by developing an alternative solution.

### Research Center for Collaborative Research and Learning

JLL supported the Faculty of Arts and Science department in relocating 25 faculty labs into the newly constructed 460,000 SF Research Center.



#### Challenges

- Coordinating with faculty and researchers to provide white glove service in a highly technical environment
- Completing lab layouts and equipment matrices within an aggressive deadline
- Coordinating more than 25 specialty vendors for the disassembly, reassembly and recalibration of all lab equipment
- Last minute changes to lab layout impacting equipment utilities and placement

#### Results

- Strong communication resulting in immediate solutions to equipment placement
- Long term relationships with lab equipment service vendors resulting in accelerated vendor support
- Minimizing any impact on research work and protocols
- Full control over multiple vendors, resulting in on schedule and within budget performance

## Case Study #2: College of William and Mary

Project: RPM services for the Integrated Science Center, Phase 3

Client since: 2015

Project Completed: 2016

Location: Williamsburg, VA

Portfolio size: 180,000 SF

Project value: \$587,000

Specialty space: Data center, biology, chemistry, behavioral sciences, research and teaching labs, computer labs, administrative spaces, greenhouse space



JLL was engaged for 22 months to provide all relocation planning and management services associated with the construction of the Integrated Science Center Phase 3 (ISC 3). While JLL was responsible for the move management of the new ISC being occupied by the Departments of Applied Sciences, High Performance Computing, Biology, Chemistry, Psychology, and the Greenhouse; under contract with the CM (Whiting Turner) JLL was further tasked to assist in the complete closure of the existing facility, resulting in additional three departmental moves into various swing spaces and the newly renovated 4-story Tyler Hall. The expanded scope included furniture installation and coordination of smaller interrelated on-campus renovations and relocations.

The total scope included over 165 offices and administrative spaces, 32 lab and computer lab spaces, eight teaching labs, a data center and the contents of the campus greenhouse. Equipment and move contents included but were not limited to fume hoods, DI filtration systems, scanning electron microscopes, HPLC systems, optical tables, incubators, centrifuges, bio-safety cabinets, chemicals, biological/plant materials and stacked, high-density file storage systems for biological and herbarium collections.

### Challenges

- Resolving move schedule conflicts between academic calendar and delays in construction and COI
- Procurement, installation and placement of new and existing scientific equipment, data equipment and furniture in accordance to state and health and safety guidelines
- Relocation of the Biology Greenhouse in accordance with plan grow schedule
- Detailed move coordination with multiple specialty movers and lab equipment services vendors

### Result

- Phased occupancy avoiding impact to the 2016 end of year academic schedule, summer programs and the start of 2017 academic schedule

*“Thank you Courtney. You are amazing with keeping track of all these details.”* – Martha – Martha A. Case, Associate Professor of Biology, College Conservator of Botanical Collections



## Case Study #3: National Cancer Institute (NCI)

Client since: 1997

Location: Maryland (Bethesda, Rockville and Frederick)

Square footage: 1.8M

Value: \$8,918,000

Total people moved: 7,000+

Specialty space/work: Labs, office, HQ, tissue slides, emergency response



The National Cancer Institute (NCI), part of the U.S. Department of Health and Human Services, is the nation's medical research agency and the largest of the 27 NIH Institutes and Centers. NCI's administrative headquarters is located on its own Rockville Campus, MD, while the institute's research and clinical facilities are located on the NIH campus in Bethesda, and Ft. Dietrich, Frederick, MD. Over the years JLL was engaged in multiple projects, including the occupancy of the entire headquarters from multiple facilities throughout Montgomery County into the newly constructed headquarters (2012 – 2014), totaling the relocation of 2,500 employees.

Under a second of a five year BPA contract re-awarded this past summer, a team of three full time relocation and project managers is supporting NCI during continuous renovations, space updates and reorganizations that reflect growth and changing needs in research. Below is a summary of our on-going work:

- Engaged under an NIH IDIQ contract to support various institutes including NCI in multiple relocations within and between buildings 10, 47, 42, 37, 36, 9, and the Porter Neuroscience Research Center at the NIH Bethesda Campus
- Managed the NCI 570,000 SF headquarter move of more than 2,500 occupants from three separate locations (2012 – 2014)
- Managed 1,114 relocation work requests, including 850 office moves, 56 complete research laboratories and almost 300 separate lab equipment moves, completing as many as 250 work orders per year
- Managing 32 specialty vendors under JLL's contracts, including in the research arena chemical movers, riggers, environmental cleaners, and technicians/engineers servicing scientific equipment, research materials and sensitive specimens; and in the administrative arena general movers, architects and designers and supplemental resources when needed
- Provided emergency response during power outage to move freezers, preventing loss of irreplaceable research materials
- Facilitated and managed the planning and relocation of over 4,000 tissue slides and blocks into a high-density storage facility
- Supporting daily moves of headquarters employees with office and filing contents

### Challenges

- Meeting strict deadlines - Each work order ticket has specified deadlines, such as: Routine work order (churn) - plan to be submitted within 24 hours of initial inquiry, estimate within 24 – 48 hours, execution within one week; Emergency work order ticket – plan to be submitted within 2 hours of initial inquiry, including estimate and executed within 24 hours



- Multiple meetings, daily, weekly, bi-weekly, monthly with client Contracting Officer's Representative (COR), OSFM Furniture Procurement, NCI IT, and NCI Telecommunication team, individual task order generators, such as department heads and principal investigators and numerous OSFM Project Managers; and generation of multiple reports: weekly and monthly work order progress, budget reports, invoice reconciliation; all while work ticket management is on-going
- Contract management of move vendor; chemical, HazMat and other specialty equipment servicing vendors
- On-site move and equipment supervision, including moves of bio-medical research equipment, samples and specimens (such as bio-safety cabinets, sequencers, analyzers, centrifuges, electron microscopes, NMR's, optical air tables, micro and high-speed centrifuges, LN2 tanks, deep freezers)

## Results

- Longstanding partnership of over 20 years
- All projects completed on-time and on-budget
- JLL's quick-response RPM services consistently meet the individual requestor's needs and schedule. Move schedules are carefully coordinated to meet the needs of renovation and furniture installation schedules. Lab moves are choreographed to minimize any potential risks and avoid any disruption to research associated with the handling and servicing requirements of the scientific equipment, research materials and sensitive specimens.
- Quality assurance, takes place throughout the project using Key Performance Indicators (quality survey) to measure effectiveness of our performance

## Case Study #4: U.S. Securities and Exchange Commission (SEC)

Geography: United States

Client since: 1997

Portfolio size: 1M+ SF

People moved: 5,000+

Specialty space: Forensics Lab, high density file rooms, hearing rooms, secured storage facilities, auditoriums



JLL has provided RPM Services to support the U.S. Securities and Exchange Commission's real estate and facilities team since 1997. In 2010 and again in 2016, we were awarded 5-year BPA contracts for Comprehensive Furniture Management Services (CFMS), which included relocation management. Below is a representative list of some of the key projects throughout our partnership:

- **15-phase, former headquarters relocation** – JLL has managed major SEC moves since 1997, beginning with a involving the move of personnel, furniture, equipment and special spaces to internal swing space and then back into their renovated space. The project involved 300,000 SF and 1,650 positions.
- **Relocated new headquarters to Station Place 1** – a newly constructed 504,000 SF building in Washington, DC. JLL provided relocation management services for this 12-phase move of 1,810 staff, furniture and equipment.
- **Seven-phase SEC relocation of 450 personnel into Station Place 2**, a newly constructed 126,000 SF addition adjacent to the headquarters facility. JLL also reorganized 585 existing occupants at Station Place 1.
- **Four-phase headquarters expansion into Station Place 3** – JLL provided furniture procurement, installation and move management for this newly constructed facility for 500 staff.
- **Regional Office Lease Expiration Projects** – JLL has provided relocation and furniture planning services for renovated or newly constructed facilities in Atlanta, San Francisco, Fort Worth, Miami, Philadelphia, Denver, Salt Lake, Los Angeles, New York City, Boston and Chicago. All projects were completed on time and on budget.

### Challenges

- Proving white glove service to the nearly 1,300 attorneys within the agency
- Renovation in place with little swing space
- Condensed schedules
- Concurrent projects, multiple locations

### Results

- Providing a seamless transition to all personnel affected by these projects and much needed support for their regional office facilities staff
- Comprehensive knowledge of SEC's space challenges and goals resulted in a long-term mutually successful relationship
- Reuse of existing furniture resulting in major cost savings
- All projects have been completed on-time and on-budget.

- In 2010, JLL was awarded a five-year Blanket Purchase Agreement – Furniture & Move Services: In contract for furniture management and relocation services to be carried out in the SECs DC Headquarters, Alexandria Operations Center, and 11 regional offices. The new BPA contract was awarded through 2021.

### Case Study #5: Apollo Group (University of Phoenix)

Client since: 2011

Location: Multiple locations in the U.S.

Number of annual moves: 10,000

Size: 6.9M SF

Specialty space: classrooms



Apollo/University of Phoenix hired JLL to implement process change in integrated relocation services. The expectation was an improved delivery, cost savings and complete client satisfaction. Fulfilling the expectations resulted in a contract renewal. Work is generally performed by four full time JLL move managers with supplemental resources during peaks and surges.

#### Summary of work

- Corporate site reduction – 23 decommission projects
- National classroom/administrative site reduction 179 decommission projects
- Furniture asset management – Inventory/redeploy/liquidation/donation (\$7M managed/\$4M redeployed/\$3M donated and liquidated)
- Relocation of 41,434 people or 120% of population in distinct project assignments
- Move management of daily churn – under daily work tickets moved over 9,000 people
- Large furniture installations – each over \$5,000 resulting in 282 distinct projects, totaling more than \$20M
- Small work order churn activities in furniture and ergonomic/ADA reconfigurations generating almost 8,500 work order tickets

#### Challenges

- Evaluation, analysis of existing move program and recommendations for improvement in communication, content inventory controls and move process protocols
- Review of existing space and furniture standards and implementing protocols for compliance
- Developed a standardized Ergonomic/ADA program
- Qualified preferred move vendor firms under JLL contract. Implemented the RFP process for project work and process training

#### Results

- Reduction in move volume and durations
- Recognized \$1M cost savings in labor management

- Reduced post-move issues by over 60% of previous approach
- Survey satisfaction scores averaged 4.8 out of 5.0 over 5 years
- Inventory reuse eliminated \$4M in furniture purchase

## Section 2: Methodology/Approach

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### **VI. STATEMENT OF NEEDS:**

VCU requires the qualified source to provide move management services for a variety of projects ranging from small renovations to major capital projects including new construction. Projects may involve multiple phases that can occur over the course of several months or years. VCU serves a wide variety of clients and customer satisfaction is our highest priority. The types of items being moved may include, but are not limited to, the following: office furniture, office systems furniture, classroom and library furniture, high-density filing systems, artwork and sculpture, office equipment, research laboratory equipment and personal belongings. The majority of relocations occur in the City of Richmond and surrounding counties, and may include, but are not limited to, facilities owned by the State of Virginia, facilities owned by the VCU Real Estate Foundation or facilities leased by the University. Please note, many of these moves will take place at night and on weekends due to the heavily scheduled facilities at VCU. All projects shall be limited to the University and shall not be affiliated or associated with VCU Health (hospital) projects.

### **Our Understanding of the Requirement**

JLL's approach to meet VCU's needs is based on extensive experience in managing a variety of relocation projects in conjunction with new construction or renovation teams, as well as supporting reorganizations and departmental reassignments. Our method is built on a foundation of logistical planning, distilling interrelated and concurrent activities to an actionable Relocation Project Master Plan. We analyze planned activities both separately for individual requirements and details, and in conjunction with each other, to define appropriate staffing. We identify overlaps, redundancies and schedule conflicts that may affect the smooth operations of the academic and teaching environment, and bring practical solutions to resolve the conflicts.

Our 40 years of experience servicing the higher education institutions nationwide in relocation planning, furniture, furnishings and equipment (FF&E) management has resulted in successful delivery and repeated business with our clients. We understand the unique requirements of academic, research and administrative spaces and how to work effectively within the university environment.

We provide individualized support to each client department to minimize the stress prior, during and after each move by emphasizing continuous communication with all stakeholders and end-users. Our deep bench of local resources guarantees that projects will be fully staffed with qualified professionals during project start-up, the planning stage and during surges in move activities, whether these take place during regular, weekend or off-hours.

Our experienced staff relies on well-developed best practices that integrate move logistics planning with practical solutions and experience from a long range of lessons learned to meet our client's budget and schedule. Our professionals have experience in multiple fields from logistics and project planning to furniture, filing and equipment space planning, procurement and installation management. Through a repeated exposure to multiple laboratory relocations we are up-to-date on laboratory equipment servicing needs, relocation and installation and full understanding on coordination of safe transfer of HazMat, chemicals and research specimen contents. We understand fully that the University relies on contract professionals to guide the departments in sustainable surplus and effective cost-savings when managing FF&E disposition and are ready to demonstrate our experience and skill in this field.

**GOALS:** VCU requires “white glove” move management services by a person or firm with strong customer orientation, attention to detail as well as excellent organizational, problem-solving and interpersonal skills. Relocation projects can be extremely stressful to clients, particularly while the move is in progress. The Move Manager must be able to convey competency and poise under pressure and consistently demonstrate the ability to resolve issues in the field based on experience and with the client’s best interest in mind. The goal is to have a single point of contact who will seamlessly orchestrate the move from start to finish in compliance with the client’s needs and pre-determined schedule. Coordination with a VCU Project Manager and/or VCU Interior Designer shall be required. Coordination with VCU Construction Management, VCU Renovations, the VCU Campus Coordinator, and VCU Information Technology, VCU Environmental Health and Safety and other university resources shall be necessary, depending on the project and upon client request.

### **Our approach to achieving your goals**

As indicated below in the organizational chart, we believe that having a single day-to-day contact located on-site in the Richmond area, is crucial in meeting VCU’s goal to provide timely communication and response to alleviate client stress level and to instill a calm confidence under pressure that assures that the JLL move manager is capable in executing each move flawlessly. Our proposed Move Manager, Courtney Mains, has the necessary experience and skillset in not just identifying any issues before they become problems, but also bringing the requisite solutions so that issues are resolved immediately. Courtney is highly organized and has proven budget management skills. In short, he always keeps the client’s best interest at the forefront of his management strategy.

While Courtney Mains is the on-site Move Manager addressing the relocation needs of VCU, we feel that the entire effort should be led from a programming perspective by a program manager who can ensure that additional resources are always available when necessary, and provide the continuous quality control and “white glove” approach that VCU requires and to which we are committed. Such organizational leadership is necessary to ensure smooth operations during high volume activities. The Program Manager designated to this effort is Kevin Wall, a leader with experience in multi-faceted project work within the higher education as well as in the public institutions arena. JLL considers this strategic programming role crucial to assure our clients of consistent quality delivery and does not plan to charge VCU for this service.

Supporting Courtney Mains will be two space planners who will be utilized in accordance to the need in inventory gathering, space planning, and existing furniture utilization, and any additional CAD support. On the move management side, we will provide additional move managers available during multiple activities to supervise actual move events. Their resumes are included in the Appendices.

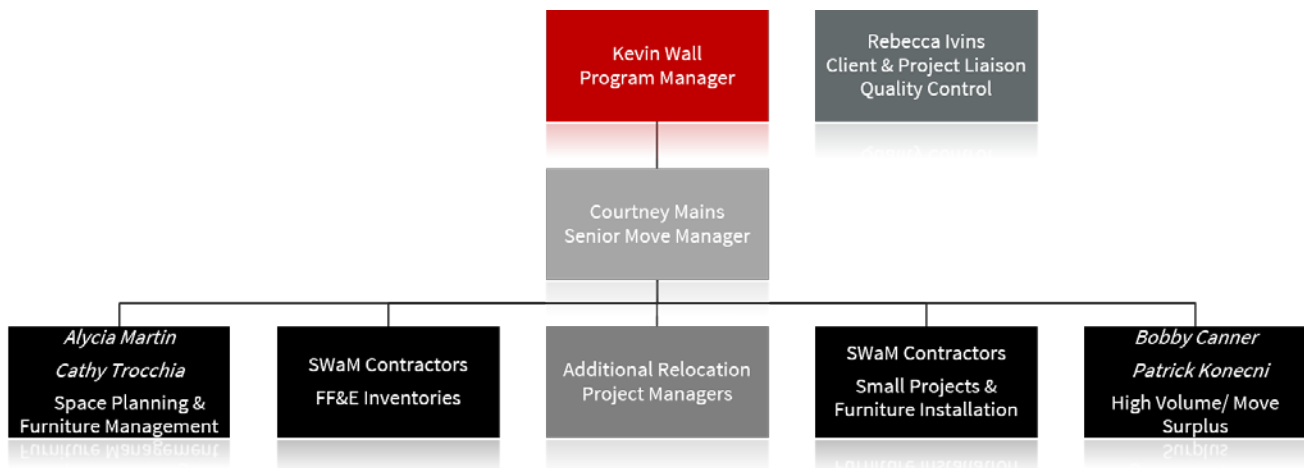
To ensure complete transparency, we will occasionally reach out to our JLL Subject Matter Expert (SME), Rebecca Ivins who has been associated for a long time with VCU in various professional assignments. Rebecca’s familiarity of VCU culture and intimate knowledge of Richmond’s local resources will further ensure that our team will provide the quality services that VCU requires. As the occasional SME, Rebecca’s time spent on this project will be provided at no additional charge to VCU.

Additionally, we have secured four firms to support us in the FF&E inventory gathering, small project management and on-site furniture installation supervision, including high density filing and library furniture assessment and outfitting. Our partners have extensive experience in all these areas and will be able to support us not just with consultation but with on-site personnel support.

The goal to seamlessly orchestrate moves from start to finish is achieved by the JLL team through immediate response to requests for estimates. To arrive at an accurate quote, we gather data from the key stakeholders and departments, including such critical details as space types (administrative, teaching, laboratory environments), building access, furniture and equipment needs, changes in space, special move or rigger requirements, hazardous material contents, surplus requirements and other concerns. We take this information in aggregate and build a strategic move plan to maximize utilization and cost effectiveness. We translate the move plan into the move and/or other vendor scope of work to receive accurate quotes and estimates. Once approved, we develop a detailed project and move schedule with assigned tasks to specific dates and when appropriate to specific hours. We look for any opportunities for efficiencies – in space plans and existing furniture designations, departmental adjacencies, existing resources, procurement schedule and deliveries, move logistics and specialty service vendor’s service dates. This detailed plan provides our clients with a lower cost and lowest risk move plan that represents the cumulative needs of all impacted departments, faculty and staff. Our extensive experience in the task order management, gained at NCI as well as at DISA and DIA over the last five years prepares us to address your scope of work with confidence in smooth operations and outcomes.

Addressing multiple relocation project work requires extensive coordination and communication with numerous internal and external stakeholders including project manager, engineering, architectural and interior designer services managers, construction management and renovations, campus coordinator, information technology, environmental health and safety, client representatives, general services manager for physical plant support services and facilities and campus security. In addition, the move manager must coordinate and be the communication liaison between the VCU stakeholders and critical external move related vendors.

**Organizational Chart**



**Skills:**

The Move Manager shall have experience with move management and excel in the following skill sets:

- Planning and Organization
- Problem Solving
- Interpersonal Communication
- Budget Management

The Move Manager shall:

- Work directly with the client group to develop a detailed scope of work and schedule, to include a contingency plan to allow for poor weather conditions and other potential mishaps.
- Work with VCU's Project Manager to coordinate the procurement of movers and any other internal or external vendors required to ensure all items are disconnected, relocated and reconnected per the move parameters and in compliance with state procurement policies.
- Complete detailed furniture and equipment inventories to include asset tag identification numbers and coordinate surplus removal per VCU requirements.
- Complete field measurements, confirm site conditions and provide space plans to ensure the proper placement of items during each relocation.
- Create a color-coded move labeling system and corresponding signage to streamline each move.
- Provide detailed move instructions for presentation to the client group to ensure their understanding of all move preparations and that expectations are met in advance of each move.
- Arrange for interim storage and/or swing space relocations as needed.
- Staff the job as needed to ensure security and reliability in tracking the movement of the client's assets. It may be necessary to have a Move Manager at the origin, multiple origins, destination or multiple destinations at one time. There may also be circumstances in which multiple relocation projects are scheduled during the peak timeframes, such as spring and Winter breaks, in which additional staffing would be required.
- Provide "Day One" services and follow-up on any move-related punch list items post-relocation as needed.
- Be responsible for providing these and all tasks detailed here and as dictated by the relocation project scope of work and VCU Project Manager's or Client Group's request for services.

Courtney Mains, as Move Manager, will work directly with the client group developing a detailed scope of work, relocation plan and schedule including contingency plans to address specific risks associated with each particular move. From the onset, the move manager will develop a cost estimate for accurate budget forecasting. In addition, the move manager will work closely with the VCU project manager in the procurement of movers and other internal and external vendors to assure a flawless move that complies with state procurement policies.

The move manager and his team's tactical responsibilities will be dictated by the specific client group and VCU project manager's requests and will include furniture and equipment inventories with asset tags, color coded move labeling and signage for each move. During in-place renovations where clients will remain in the space, we will develop a swing-move plan detailing who moves when and to which location. When storage of assets is required, arrangements for interim warehousing will be made. We will conduct and confirm field measurements and generate space plans delineating the locations of furniture and equipment and will conduct facility walk-throughs to confirm site conditions. Pre-move briefings with move instructions and move instruction packets will be provided to every client member that is moving and pre-move "check-outs" will typically be conducted to assure that every item on the check-out list is in fact ready to be moved.

It is JLL's policy to have a project manager at both the send and receive sites when mover activity is occurring, thus assuring that the proper assets are being moved in the correct sequence and to enhance security. We are experienced in compressing physical moves into short periods such as university holiday breaks and have the depth of resources to dedicate significant additional surge staffing and operate 24/7 if needed.



A best practice of the move manager is to establish a post-move service desk in the destination area. A physical presence for after move support combined with on-line and phone access to report move issues allows the client group to communicate in their preferred manner and allows JLL to respond to needs rapidly.

## **VII. GENERAL REQUIREMENTS:**

### **A. Planning & Needs Assessment**

The contractor shall:

1. Meet with the client group(s) to complete a needs assessment and determine the move parameters. Define project scope and develop a master relocation schedule. Participate in regular on-site progress meetings with the project team.
2. Complete necessary site visits at each origin and destination facility. Determine the path of travel for the move, loading zones and loading dock access. Identify special requirements such as temporary parking permits for moving trucks or specialty relocation equipment.
3. Outline roles, responsibilities and interrelationships of all internal and external team members. Identify the "move liaisons" assigned to each department who will both assist in defining departmental needs and distribute important relocation information and instruction to all personnel.
4. Hold regular meetings with the move liaison's to keep them informed and confident about the progress of the move.
5. Issue a project directory to include the names and contact information of all individuals and vendors associated with the relocation.
6. Generate a move matrix to capture all employee "from" and "to" locations, telecommunication and network details. The following information shall be included in the move matrix: personnel names, phone numbers [both existing and new phone number orders], fax numbers, "from" room locations, and "to" room locations. This information will be utilized for telecommunications coordination and to generate move signage to be posted in the destination(s) prior to the move.
7. Obtain and issue an "emergency" telephone list for reference during the relocation. Phone numbers shall include the cell phone numbers for move liaisons, building managers, campus coordinators, elevator repairmen, electricians and the general contractor.

To execute a successful relocation, JLL knows from experience that all stakeholders must be involved and informed. A flawless plan must be developed and executed to provide a positive experience with minimal disruption to day-to-day operations. We have developed a project approach and process that accommodates concurrent project activities, follows a schedule that dovetails design, construction and business operation activities, and mitigates risk inherent to any large move activity. Our project approach is measured against our RACI chart, developed specifically for relocation management. It delineates clearly the assigned responsibilities and roles for each team member and stakeholder taking into account the cross-functionality and multiple departmental involvement with whom we consult and the varied processes and groups that need to be informed. This chart is then customized to incorporate our clients' unique needs and requirements into a seamless move and successful outcome.

JLL takes full ownership for every aspect of these relocations ranging from space planning, pre-move strategy development, furniture and filing needs, move communications and change management to move execution oversight and post move assistance. We seek to align our capabilities and resources to those understood needs resulting in the smooth, orderly and timely relocation of operations and personnel. All our relocation project managers are meticulously organized, detail-oriented, capable of delivering "high-touch" service and exceedingly communicative. Our success over the years has been the result of seeing ourselves as a direct extension of our client's team.

Our JLL project team is experienced in evaluating your requirements and adapting the approach below to your requirements. Our process for performing these services follows four simple steps:

RACI sample chart

Phase	Task/Sub Process	Client	Client leader	JLL
Pre-Activation	Construction PM	A	R	R
	As build	A	R	R
	New furniture	A	R	R
	Furniture rules	A	R	R
Initiate	Project initiation and administration	R	R	R
	Prepare for and conduct a project kick-off meeting	R	R	R
Plan	Complete data collection and inventories	R	R	R
	Finalize project plan	R	R	R
	- Establish the communication plan	R	R	R
	- Develop and/or update the relocation schedule	R	R	R
	- Develop and/or update project budget and cost assumptions	R	R	R
	- Identify project risks and mitigations	R	R	R
	- Finalize the Quality Plan and oversight	R	R	R
	Conduct Project Team Meetings	R	R	R
	Conduct move vendor RFP	R	R	R
	Conduct quality vendor RFP	R	R	R
Move	Develop and manage the move matrix	R	R	R
	Conduct Quality Check-ins	R	R	R
	Coordinate the file planning and mapping process	R	R	R
	Coordinate any FF&E, IT, AV or other vendors	R	R	R
Close	Conduct move logistics preparation	R	R	R
	Develop and distribute staff communications	R	R	R
	Develop and implement a cleanout campaign(s)	R	R	R

Overview 4-step process			
1	Initiate	2	Plan
<b>Prepare team to perform on Day One.</b>	<ul style="list-style-type: none"> <li>Project initiation and administration</li> <li>Review of Scope of Services with the VCU Project Manager</li> <li>Prepare for and conduct a project kick-off meeting</li> <li>Issue Initial Cost estimate for review</li> </ul>	<b>Taking your plan from concept to reality.</b>	<ul style="list-style-type: none"> <li>Complete data collection and inventories</li> <li>Finalize project plan</li> <li>Conduct project team and move coordinator meetings</li> <li>Conduct move vendor RFP</li> <li>Develop and manage the move matrix</li> <li>Coordinate the file planning and mapping process</li> <li>Coordinate any FF&amp;E, IT, AV or other vendors</li> </ul>
		<b>3</b>	<b>Move</b>
		<b>Flawless execution of the plan.</b>	<ul style="list-style-type: none"> <li>Conduct move logistics preparation</li> <li>Develop and distribute staff communications</li> <li>Develop and implement a cleanout campaign(s)</li> <li>Develop and distribute the move packet</li> <li>Provide on-site move supervision</li> <li>Set-up and manage a post-move support center</li> </ul>
		<b>4</b>	<b>Close</b>
		<b>Final documentation and lessons learned.</b>	<ul style="list-style-type: none"> <li>Conduct lessons learned meeting</li> <li>Update CAFM or provide data to CAFM admin</li> <li>Conduct Client Satisfaction Survey</li> <li>Complete project close administration</li> <li>Complete project close-out administration, including budget review and invoice reconciliation</li> </ul>
<b>Key phase activities</b>			

JLL provides integrated, seamless delivery from project initiation to close out.

In coordination with the VCU project manager, the JLL move manager will conduct a detailed analysis of the scope of work, a review of available background documentation and identify additional information needed to gain a full understanding of the relocation requirements. The background documentation may include: construction schedules, floor plans, inventories, equipment and personnel lists, security requirements, voice/data plans and other pertinent reference materials. Depending on the size of the project and the level of involvement of multiple project teams, stakeholders and services, the cost estimate may be provided either prior to the kick-off meeting or immediately thereafter, once all the requirements that may affect the estimate are determined.

Upon review of the existing documentation, the JLL move manager will conduct a kick-off meeting with the key personnel of the VCU team and major project stakeholders, and will verify that everyone has the same expectations and understanding of the scope of work. The objective of the project kick-off meeting is to solidify the working relationship between the client and the JLL, to identify information requirements and to define

next steps.

Project goals and objectives will be verified, communication channels and approval processes will be identified, and the project schedule will be reviewed in order to coordinate key milestone dates to complete the project successfully. The schedule of project coordination meetings and required site visits will be identified and the development of the project directory will begin.

At the kick-off meeting, the JLL move manager will include establishing progress meeting dates and project milestone dates. Milestones may include but are not limited to a “from-to” staff list, equipment/instrument list, equipment/instrument placement, packing, move, and unpacking. The JLL move manager will review the client group’s organization and make recommendations on move liaison requirements and staff roles and responsibilities.

The JLL move manager in coordination with the VCU project manager will determine the dates and times for the department/client group kick-off meetings and site visits. Typical department/client group meeting participants will include the JLL move manager, the VCU PM, and the department/client group/end user representatives or their designees; the JLL move manager will schedule, facilitate, and lead these meetings to introduce all parties and identify the roles of all participants.

The scope identification walkthrough will include identifying all FF&E such as, laboratory instruments, flammable cabinets and other laboratory contents – including: HazMat, chemicals and biological specimen, casework and systems, modular and free-standing furniture, filing, specialty furniture (library or high-density systems) computers, phones and any additional items to be moved. Discussion will include identifying and documenting any known or potential special handling requirements for any items, any required third-party effort for leased items, and the related specialty service vendors who must be engaged. As per the VCU asset management protocols, items will be recorded by their identification code.

A thorough review of the move infrastructure of each site will be conducted with the site building manager and move liaison to include walking the move travel paths, identifying staging areas, sizing the service elevators, viewing the loading areas/docks, and understanding truck access/parking on the site. Information will be gathered regarding the specific building move guidelines, coordination and scheduling of moves, and requirements for certificates of insurance.

### **Move Manager Role and Responsibilities**

There are a number of internal and external functional areas represented on the team assembled to execute each relocation project. These members work together towards a common goal and form the basis of the integrated relocation project team. In addition to the JLL team there are a number of representatives from within VCU and the various vendors that form the integrated planning team tailored for each relocation project. The VCU project manager, the JLL move manager and the VCU Move liaisons form the core of each team.

### **JLL Move Manager**

The JLL move manager shall serve as the single point of contact who will oversee all relocation projects for VCU under the direction of the VCU project manager. The JLL move manager will be supported by a team of JLL professionals with access to the deep and wide-ranging expertise of our entire organization. Our staff has the requisite experience with move management and excels in the following areas: interpersonal communications planning, coordinating; managing relocations; project budgeting and schedule management; and problem solving/solutions delivery.

Move manager responsibilities include:

- Plan, coordinate, and manage all relocation services and perform all tasks detailed in the project scope of work and as instructed by the VCU project manager or VCU client group's request for services
- Schedule, facilitate, and document all relocation project meetings
- Produce both a project directory and move day contact list
- Develop a detailed scope of work and schedule to include contingency plans
- Coordinate the procurement of movers and required vendors under the direction of the VCU project manager
- Conduct detailed furniture and equipment inventories
- Coordinate surplus item removal and disposition in accordance with VCU policies and procedures
- Conduct site visits to evaluate items for relocation and building infrastructure
- Generate the move matrix a move matrix to capture all move related data
- Coordinate requirements for staging areas, temporary storage, and swing space
- Produce, distribute, and present detailed move instruction guides/ packages complete with color-coded labels/tags
- Produce space plans, layouts, and signage to support all relocations
- Staff and supervise the conduct of the move at both origination and destination locations throughout the relocation to include multiple locations and multiple projects simultaneously

### Move instructions sample



Name: **JOHN SMITH**  
 Department: **FACILITIES**  
 Move Date: **10/7**  
 New Location: **1205**  
 From: **6110-743**

Below are detailed instructions for your upcoming move, feel free to contact your Move Coordinator, Nancy Taylor, with any questions. Thank you!

#### Move Dates

Your move to 110 River Rd. is currently scheduled to begin at 5:00pm on Friday, October 7<sup>th</sup>. You should checkout with your Move Coordinator by 3:00pm and be out of your office space no later than 5:00pm as the IT equipment team and movers will begin to prepare your space for the relocation.

#### Moving Crates

The first delivery of plastic moving crates will occur two weeks before your move date. All moving crates should be emptied one week following your move date. Please place any empty crates outside of your workspace to be picked up by the movers. If you are unable to unpack within a week after your move, please advise your move coordinator in advance of the move.

#### Packing & Labeling

Your personalized move labels are included in this package. You are responsible for packing or purging everything from your desk, bookshelves, file drawers and the overall contents of your workstation or office. If you will be on leave or travel during the move, please be sure to have all items packed and ready on your last day in the office. Every drawer must be clean and empty before checking out prior to the move. Please use only the move labels provided to you in this package. If you need extra labels, please see your move coordinator. Labels should be placed on the short, vertical side of each crate as shown below. Remember, if an item does not have a label on it, it will NOT move.



- Plan, coordinate, and manage the Command Center during the move and the Post Move Support Center Desk in the days after the move.
- Work in close coordination with the VCU move liaisons for each relocation project to advise and assist them in the completion of their assigned responsibilities outlined below and ensure the success of every relocation.

It is JLL’s standard practice to have our on-site move managers to report to either a program manager or an account lead who ensures overall quality delivery. The program manager monitors the execution of the services without impeding the day-to-day management of the projects and task orders and provides an additional level of communication for VCU to voice any concerns should there be any.

**Post move adjustment sample**

RECEIVED  
Date: \_\_\_\_\_  
Time: \_\_\_\_\_  
Initial: \_\_\_\_\_

**SMITH, JOHN**  
**1205 @ 110 RIVER RD. - BLUE / GREEN**  
(FROM 6110 EXECUTIVE RD 743)  
FACILITIES  
MOVE COORDINATOR: N. TAYLOR

**POST-MOVE ADJUSTMENT PHASE 1**  
**JLL**

Below is a list of problems that I have encountered in my work space:

1. Telephone/Computer	2. Movers
3. Furniture	4. Facilities

**VCU Move Liaisons**

The VCU department/client group move liaison will play a key and essential role in the relocation process and will work with the JLL move manager to coordinate a smooth move.

The role of the move liaisons will be to assist in the planning and preparations for the move. The move liaisons’ involvement will facilitate a smooth relocation by acting as a go-between for their department/client group and the move team. The move liaisons will serve as a conduit of information so all individual departmental concerns can be addressed, and each department will be informed about all aspects of the move.

The VCU move liaisons will be guided and informed throughout each relocation project by the JLL move manager and the JLL Team.

**Responsibilities**

- Attend scheduled move planning meetings with the JLL move manager
- Determine departmental requirements
- Storage and file needs
- Equipment, including PC’s, printers, faxes, copier access
- Operational issues surrounding timing of pre-move shutdown
- Areas and items requiring specialty handling or assistance
- Individuals requiring reasonable accommodations
- Common areas to be organized and packed
- Communicate all requirements and concerns to the JLL move manager
- Finalize allocation of common space (e.g., storage, files)

- Notify JLL of seating plan changes
- Determine whether any personnel will be absent during packing or unpacking process and inform JLL move manager
- Distribute move instructions as supplied by JLL
- Notify JLL if packing supplies run low
- Assign responsibility for packing and tagging common areas
- Remind personnel to take home plants, valuable or sentimental art and other personal belongings
- Conduct a walk-through with a member of the JLL team prior to the commencement of the move
- Direct staff to the post-move Support Center or compile and submit requests
- Serve as departmental representative through move process

Project coordination and strong project communications are critical to every phase of the project process so the establishment of an internal communications strategy is key to the success of the project. To that end, we focus from the outset of the project on the development of a plan that establishes direct communication links with the VCU Project Team, the VCU move liaisons and most importantly the affected staff. Our goal is to convey the right message to the right audience at the right time. An example move sequence table can be found on the following page.

## Sample Detailed Move Sequence Table

SAMPLE Detailed Move Sequence														
DATE	TIME		Type	ACTIVITY	JLL Team			Vendor			Location			
					SPM	PM	APM	MV	FI	PT				
Thursday, January 14, 2016	10:00 AM	Noon	Pre-Move	Pre-Move Building Inspection w/ Building Management	x			x			Destination: 16th			
Thursday, January 14, 2016	2:00 PM	4:00 PM	Pre-Move	Pre-Move Building Inspection w/ Building Management	x			x			Origin: 4th, 7th, 8th			
Thursday, January 14, 2016	8:00 AM	4:00 PM	Pre-Move	Packing Common Area Files & Supplies		x		x			Origin: 4th, 7th, 8th			
Thursday, January 14, 2016	2:00 PM	5:00 PM	Pre-Move	Hang Move Placards, Layouts & Directionals			x				Destination: 16th			
Friday, January 15, 2016	8:00 AM	4:00 PM	Pre-Move	Install Building Protection			x	x			Destination: 16th			
Friday, January 15, 2016	8:00 AM	2:00 PM	Pre-Move	MC & JLL Team Check-Out Staff	x	x					Origin: 4th, 7th, 8th			
Friday, January 15, 2016	2:00 PM	4:00 PM	Pre-Move	MC Check-out & Walkthrough	x						Origin: 4th, 7th, 8th			
Friday, January 15, 2016	4:00 PM	8:00 PM	Move	IT Disconnect of Desktop Equipment & Shared Equipment		x				x	Origin: 4th, 7th, 8th			
Friday, January 15, 2016	8:00 PM	8:15 PM	Update	Move Progress Update Call	x	x	x	x	x	x	Conference Call Move Team & Project Team			
Friday, January 15, 2016	4:00 PM	10:00 PM	Move	Disassembly of Reuse Furniture (20 Offices & 5 File/Storage Rooms)		x			x		Origin: 4th, 7th, 8th			
Friday, January 15, 2016	5:00 PM	11:00 PM	Move	Pull IT Equipment & Reuse Furniture; Start with 4th Floor, then 8th Floor and finish on 7th Floor		x		x			Origin: 4th, 7th, 8th			
Friday, January 15, 2016	5:00 PM	11:00 PM	Move	Receieve IT Equipment & Reuse Furniture	x			x			Destination: 16th			
Friday, January 15, 2016	8:00 PM	11:00 PM	Move	IT Reconnects at New Furniture Locations	x					x	Destination: 16th			
Friday, January 15, 2016	11:00 PM	11:15 PM	Update	Move Progress Update Email @ Shift End	x	x	x	x	x	x	Nightly Email Update Move Team & Project Team			
Saturday, January 16, 2016	8:00 AM	4:00 PM	Move	Load/Move Reuse Furniture & Contents; Pull any remaining furniture, then content 4th, 8th 7th Floor	x			x			Origin: 4th, 7th, 8th			
Saturday, January 16, 2016	8:00 AM	4:00 PM	Move	Receive Reuse Furniture & Contents		x		x			Destination: 16th			
Saturday, January 16, 2016	8:00 AM	4:00 PM	Move	Install Reuse Furniture (20 Offices & 5 File/Storage Rooms)	x			x	x		Destination: 16th			
Saturday, January 16, 2016	9:00 AM	7:00 PM	Move	Complete All IT Reconnects, Including Shared Equipment	x					x	Destination: 16th			
Friday, January 15, 2016	11:00 AM	11:15 AM	Update	Move Progress Update Call	x	x	x	x	x	x	Conference Call Move Team & Project Team			
Saturday, January 16, 2016	3:00 PM	8:00 PM	Move	Complete Check-Ins & Fine Tune	x		x	x	x	x	Destination: 16th			

Project coordination meetings will be conducted by the JLL project team with participation of the move manager, the VCU move liaisons and all other team members deemed necessary, per the schedule developed at the kick-off meeting. The project coordination meetings will be conducted weekly at the beginning of the project and based on project activity meeting frequency will fluctuate depending on the phase of the relocation.

One day prior to each meeting, the JLL move manager will distribute the agenda electronically to all project team members. Draft meeting minutes for each meeting will also be distributed electronically, per the agreed-upon distribution schedule, two business days after each meeting. Final meeting minutes that incorporate any requested additions, changes and deletions from the recipients will be distributed electronically one business day after receipt of changes.

Meeting minutes will include the following: itemized summaries of discussions, decisions and directives during each meeting; a list of attendees, and an action item report (AIR) developed by the JLL project team. The meeting minutes/AIR shall serve as a working document and will be updated by JLL during each project team meeting. The document will track the status of completed, past due and tasks due for completion and the assigned responsible parties.

The project directory serves as a single repository for the contact information for use by all relocation project participants inclusive of all vendors, VCU staff and support, VCU move liaisons, and the JLL team.

The project directory will include contact information for the following at a minimum:

- VCU project manager
- JLL move manager
- VCU move liaisons
- Construction team POCs
- VCU campus coordinators
- VCU desktop support
- VCU net
- VCU telecommunications
- VCU surplus
- VCU facilities management
- VCU Office of Environmental Health & Safety
- VCU relocation management services contract administrator
- VCU general services manager for physical plant support services & special projects
- VCU Police
- All move-related vendors

The JLL team will develop and manage the move matrix, a master database that reflects all from-to data, network information, and telecommunications information for both the send and receive locations. This covers the largest volume of items being moved and is based on a “data gather, plan, communicate, execute” methodology. The JLL move manager will work side by side with the VCU move liaisons to verify they have accounted for relocating all people, files, contents and equipment to the appropriate location. The JLL move manager in coordination with the VCU move liaisons will manage a database of information. This data will be communicated in several forms, but primarily through the move matrix, equipment database, floor plans with seating allocations and changes in existing furniture layouts. The move matrix used by the JLL team will facilitate production and use of both color-coded pre-printed labels customized for each individual and/or area moving and all move related signage and wayfinding postings. The color-coded labels and synchronized move signage simplify the process for the employees and reduce errors in the physical move.

As part of the Command Center, JLL will establish a move hotline to receive and respond to requests and questions from staff, vendors and other team members. The hotline will be put in place and activated three days prior to each move activity and will continue through the one day Post-Move Support Center, unless the size and scope of the move dictate additional time. While JLL maintains the general project directory, individual moves may necessitate additional contact information, specific to each move. JLL team will capture, create and distribute a move day contact list for use during the relocation that will include all points of contact for the JLL team and VCU move liaisons, including those captured on the general project directory as well as



any temporary or specific contacts pertaining to that day’s activity such as elevator repairmen, electricians, and security personnel on duty.

**Post-Move Support Center report sample**

Last Name	First Name	Source Bldg	Source Room	Destination Bldg	Destination Room	Department	Category	Ticket Number	Date	Time	ISSUE	STATUS (P/C)	Comments	Vendor Name
ALDANA	BEN	226 Schilling	3535	211 Schilling	4118	Commercial	Computer/Printing	3	06-Apr-16	4:08:32 PM	I can't find a printer on my print menu.	Complete		McIT
COX	DARLENE	226 Schilling	3N53	211 Schilling	153	Regulatory	Computer/Printing	21	04-Apr-16	10:17:27 AM	NO ONE IN AREA CAN MAP TO PRINTERS	Complete		McIT
ENGLES	MICHELE	226 Schilling	3N59	211 Schilling	175A	Tech Services	Computer/Printing	13	04-Apr-16	9:17:46 AM	SECOND MONITOR NOT WORKING	Complete		McIT
GOUGH	DAWN	226 Schilling	2553	211 Schilling	277	Commercial	Computer/Printing	76	06-Apr-16	8:12:11 AM	adjust keyboard setup - perform wire management	Complete		Alexander's
HOFFMAN	HEIDI	226 Schilling	2513	211 Schilling	230	Commercial	Computer/Printing	22	04-Apr-16	10:21:00 AM	DOCKING STATION NOT WORKING	Complete		McIT
TIGNOKPA	JEAN	226 Schilling		211 Schilling	172	Tech Services	Computer/Printing	10	04-Apr-16	9:06:40 AM	CANNOT ACCESS LOTUS NOTES	Complete		McIT
TRAY	KEVIN	226 Schilling	3N41	211 Schilling	185	Commercial	Computer/Printing	39	04-Apr-16	2:18:17 PM	NEEDS TO BE MAPPED TO PRINTER	Complete		McIT
ALDANA	BEN	226 Schilling	3535	211 Schilling	4118	Commercial	Damaged or Missing	5	06-Apr-16	11:15:37 AM	One of my boxes is missing.	Complete		Alexander's
GOLDSMITH	CHERYL	226 Schilling	3N69	211 Schilling	159	Regulatory	Damaged or Missing	17	04-Apr-16	9:43:20 AM	WHEEL ON FILE BROKEN OFF DURING MOVE	Complete		Alexander's
FORD	MEGAN	226 Schilling	2557	211 Schilling	246	Commercial	Mover	75	05-Apr-16	3:41:14 PM	MOVE BOX FROM 246 TO 189	Complete		Alexander's
GOLDSMITH	CHERYL	226 Schilling	3N69	211 Schilling	159	Regulatory	Mover	16	04-Apr-16	9:43:09 AM	NEEDS HELP MOVING DESK	Complete		Alexander's
GOLDSMITH	CHERYL	226 Schilling	3N69	211 Schilling	159	Regulatory	Mover	34	04-Apr-16	12:03:31 PM	PICK UP EXTRA IT EQUIPMENT AND BRING TO HELP DESK	Complete		Alexander's

**B. Furniture, Fixtures and Equipment Coordination**

The contractor shall:

1. Meet with each department to identify the placement of all furniture, fixtures and equipment being relocated into the new facility.
2. Complete an inventory of furniture, fixtures and equipment being relocated into the new facility to include measurements and photographs [as needed].
3. Review floor plans and ensure both space and operational needs (telecommunications, electrical, etc.) are met for all items being relocated. Confirm room dimensions within the new space will allow for item placement.
4. Provide space plans showing relocated items within the new facility for posting and reference during the move. Allow for up to two revisions.

The purpose of the furniture, fixtures and equipment schedule is to maintain a record of the assets used by a particular university client and allow redesign and tracking of FF&E.

JLL’s furniture, fixtures, and equipment coordination process begins with meeting with each user group manager to understand how the proposed project plan affects current furniture and equipment locations and what adjustments will be needed. JLL will manage proposed floor plans by collecting a detailed and complete inventory of existing site conditions and conducting a thorough FF&E evaluation. To assure that we remain on schedule during periods of high project volume or for a project of considerable magnitude, JLL will utilize the services of our subcontractors for detailed furniture and equipment inventory and file and storage assessment. Any involvement of our outside contractors will be managed by the JLL move manager. JLL understands that a move’s success is dependent upon meticulous pre-move logistics, planning, and preparation including detailed space plans confirming as-built conditions and location and fit of assets being moved. JLL move manager, supported by our space planners and subcontractors will perform a physical on-site survey, to confirm that the as built conditions are indeed those found in the field. The survey will confirm dimensioning of rooms and identification of all provided utilities both in the administrative and research settings. The relocation of IT systems and research equipment must be carefully coordinated to allow ample time for disconnecting,

relocating, reconnecting and testing to ensure that all equipment is in the designated locations and functioning. JLL will provide relocation space planning that will include numbered, and color-coded seating floor plans for distribution as well as the new equipment plans.

### C. Schedule Development and Maintenance

The contractor shall:

1. Interview managers and supervisors to learn what factors will influence the timing of each department's packing and relocation schedules.
2. Coordinate logistics and relocation schedules with VCU Campus Coordinators who will communicate whether or not any special events, activities or street closures will impact the move schedule.
3. Confirm construction completion and certificate of occupancy dates with the VCU Project Manager.
4. Prepare a day-by-day moving schedule for all departments and obtain approval from the VCU Project Manager.
5. Publish the move schedule to the move liaisons for distribution to all staff.
6. Publish the move schedule to the VCU Project Manager, VCU Interior Design Project Manager and VCU Campus Coordinator. Adjust, revise and redistribute according to any critical schedule changes such as those caused by construction, inspection or furniture installation delays.

The relocation schedule has two key functions: serving as a planning/organization/control tool and providing JLL project managers' communication with numerous stakeholders including: user group managers, VCU campus coordinators, VCU project manager, move liaisons, VCU interior designer(s), VCU desktop support, VCU telecommunications and possibly shop services and VCU's OEHS.

Our process begins with gathering information from the respective VCU Project Manager (through utilization of Quick FM, when authorized to proceed), the user group manager and/or move service requestor regarding their move requirements and any operational constraints. This includes academic or research schedule commitments that must not be impacted by the relocation. The interview will also ensure that any additional specialty and technical move services are accounted for as required. Lastly, we will complete a walk-through of the move origination site, proposed move pathways and destination site. Using the data gathered, the JLL team will determine sequencing of moves based on the following:

- Proposed departmental relocation plan, work schedules of the departments or regional office, and client initiatives
- Physical constraints and logistics at each site including access, construction and furniture schedules
- Safety and security considerations/requirements
- Furniture and equipment reuse
- Construction, new furniture installations

The schedule will clearly define all activities, dependencies and milestones, show the move-in deadlines with all necessary and useful sub-categories relating to all major activities. Such sub-categories will include dates for reviews and approvals, telecommunications plan and installation, computer services tasks, all sub-contractor and specialty vendor tasks, all move related activities, planning team meetings, and move-in schedules using MS Project Management software and others.

The relocation schedule is a flexible document, updated as needed and published for distribution at regular project meetings. Raising and maintaining awareness for proper relocation planning and preparedness is key to a smooth relocation, therefore, JLL will work with the VCU project manager if other distribution/publishing methods beyond project meeting minutes are appropriate. Gathering and confirming the schedule and its dependencies with a comprehensive group of stakeholders allows for early identification and solving of potential problems.

In our experience with other Virginia educational institutions, facilitating continual coordination and communication has been key to the completion of interdependent construction/relocation tasks. For example, at the College of William & Mary, competing demands for internal resources threatened delays that would have shifted the construction completion after the start of the fall semester. Identifying this risk allowed JLL to engage prior to the summer break to hold weekly meetings with the owner, core project teams and stakeholders to look for intersections of dependencies and further risks for delays. By aligning multiple project teams' efforts and raising awareness of critical completion tasks required for the activation of a new 110,000 SF science wing, 43,000 SF academic building, and several off-site research laboratories, we were able to meet the commencement of the academic year and the scheduled demolition of the defunct science building.

Coordination with core project team members is fundamental but communication with university support service stakeholders is critical as well. An example of this coordination occurred at Virginia Commonwealth University. Careful communication and coordination in planning a laboratory relocation from VCU's Sanger Hall over the Christmas break to a location in another State, securing building access and ensuring dock / freight elevator availability was paramount to the successful in the execution of the move.

#### **D. Vendor Coordination**

The contractor shall:

1. Work with the VCU Project Manager to select a move services vendor for the project.
2. Develop and issue a detailed relocation scope of work and schedule document to the move vendor for pricing.
3. Provide the move estimate to the VCU Project Manager for review and contract award.
4. Identify additional internal resources required to complete the move. 5. Work closely with the VCU Project Manager to engage services for VCU Desktop Support, VCU Net, VCU Telecommunications, VCU Surplus, VCU Facilities Management [i.e. lock shop, mechanical, electrical or plumbing technicians] and VCU Office of Environmental Health & Safety via the internal work order system.
6. Identify external resources required to complete the move.
7. Work closely with the client group to coordinate vendors and manufacturers responsible for relocating specialty office equipment and leased copier equipment that cannot be relocated by a local commercial moving company (i.e. research lab equipment, food service vendors, coffee vendors, copier service technicians). If biosafety cabinets are included in the relocation, coordinate decontamination and recertification efforts with the VCU client group.
8. Develop and issue a detailed relocation scope of work and schedule document to VCU Desktop Support or the departmental technology services individual who will be responsible for the disconnection and reconnection of all desktop computers, printers, scanners, fax machines and phones.
9. Provide the master relocation document of employee "from" and "to" locations to include phone numbers, fax numbers and new phone number orders to the VCU telecommunications technician assigned to the project via the work order issued by the VCU Project Manager.

10. If surplus is included in the project scope of work, the contractor shall complete the VCU Surplus form to include a detailed surplus inventory. All asset tags for furniture and equipment shall be included on the surplus form. If research lab equipment is included in the surplus, coordinate review and signature approval on the surplus form through the Office of Environmental Health and Safety. Provide the completed form and inventory to VCU Surplus and reference the work order issued by the VCU Project Manager. Coordinate the date and time of all surplus warehouse deliveries directly with VCU Surplus warehouse staff located at: VCU Surplus Property, 1050 Oliver Hill Way, Richmond, VA 23298. Days and hours of operation are Monday to Friday, from 8 AM to 4 PM.

11. If VCU Facilities Management services are required, such as access control or utility needs (electrical, mechanical or plumbing), the contractor shall coordinate those requests directly with the technician assigned to the project via the work order issued by the VCU Project Manager.

JLL RPM team has knowledge and experience in the coordination of internal and external service providers of higher education institutions.

JLL will work closely with the VCU project manager in the selection of a move services vendor including issuing a detailed scope of work and related move schedule for mover to provide pricing. We have extensive experience in developing scopes for all types of spaces: administrative, classroom, engineering and wet labs, student housing and other university specific facilities. Upon receipt of mover estimate, JLL will review and vet the submission to assure it conforms to and includes all the scope before submitting estimate to VCU for its review and award.

Internal service group coordination is critical. Most institutional moves involve a significant number of internal support resources and JLL routinely engages and coordinates with such groups as VCU's Desktop Support, Net, Telecommunications, Surplus, Facilities Management, Office of Environmental Health and Safety. We will engage these resources using a VCU internal work order.

Simultaneously with internal service group engagement will be external resource identification and procurement. JLL will identify all needed external service vendors and provide a scope and get an estimate from these parties to submit to VCU project manager. JLL RPM contracted with more than 80 external vendors last year supporting our client procurement process.

Once internal and external resources have been engaged, JLL will work closely with the client group coordinating the parties relocating specialty items like leased copier equipment, specialty office equipment, research lab and food service equipment under special warranty or needing OEM or maintenance vendor move handling. JLL has extensive lab relocation experience with higher education and similar institutions and will arrange for biosafety cabinet decontamination and recertification on behalf of the VCU client group.

JLL will create and issue a detailed relocation scope and schedule to VCU Desktop Support or the departmental technology service manager responsible for disconnect/reconnect of desktop hardware and phones. Again, JLL routinely coordinates and collaborates with internal or external desktop support groups and are responsible for 1000's of successful desktop device disconnect, move and reconnect actions in the Virginia, Maryland, DC area each year.

JLL develops a master "from" and "to" database that will contain not only the locations of each individual moving, but also special furniture, IT, technical or lab requirements so that one list can be used by various resources to support a coordinated move. The database will include, besides "from/to" lists, phone numbers, fax numbers, new phone orders to the VCU Telecommunications technician via work order from the VCU project

manager. JLL will have the responsibility for keeping the data current and identify any changes impacting relevant internal and external resources.

Increasingly our clients have to process surplus assets and each has a very specific protocol for handling such excessing. If the VCU move requires surplus management, JLL will complete VCU Surplus form including a detailed surplus inventory with tags on all assets that are recorded in the Surplus form. Lab equipment being surplus will have the review and approval of the Office of Environmental Health and Safety. We manage a very similar process for NIH to assure that lab equipment being surplus is approved, certified as decontaminated and identified as procured from general funds or special grants which may dictate the surplus process and accounting for such assets. Once ready for surplus, JLL will provide the completed form to VCU Surplus referencing the VCU work order. We will then coordinate and schedule the logistics of surplus assets including the date and time of warehouse deliveries with the VCU warehouse staff.

When such services as access control or utility needs are required, JLL will work with VCU Facilities Management and coordinate requests (via work order) directly with the technician assigned to the project.

**E. Packing and Labeling**

The contractor shall:

1. Develop a detailed labeling system customized to meet the needs of the client so that items are packed, relocated and unpacked efficiently. The move labeling and signage system shall be based on the path of travel from the elevator and/or suite entry and must identify, by separate number, all potential areas in which items would be placed. Create relocation floor plans to demonstrate the move numbering system. Create and hang corresponding relocation signage and move plans at the destination(s).
2. Provide pre-move instruction and training for user groups via a “Town Hall” packing demonstration. Packing services cannot be provided by the move vendor. VCU Departments shall be responsible for packing, unpacking and labeling computers, phones, printers and the contents of their offices.
3. Customize and provide packing instruction documents to meet the needs of the client. Include detailed information with regard to the schedule, packing materials and how to prepare for the relocation.
4. Post directional and move signs at the destination in accordance with the labeling system prior to the move. Move signs shall be posted in all areas where items are to be relocated.
5. Post plans of the building with color-coded sections in accordance with the labeling system. Plans shall be posted at the loading zones and elevator lobbies for reference during the move.
6. Label furniture, fixtures and equipment as needed.

JLL will develop a detailed move labeling system to allow efficient client packing and clear direction to all vendors servicing and handling the items. The method will be based on the room numbering sequence and the move travel path. The labeling convention will also be included in the relocation drawings. We will prepare, present and utilize an array of tools aimed at assisting the employee population in organizing and preparing for the move to include related graphics and written instruction. Materials include: pre-move packing instructions that

**Check out sheet sample**

Smith, John

1205 @ 110 River Rd. - Blue / Green  
(From 6110 Executive Rd 743)

**CHECK-OUT SHEET** Phase 1 Facilities  
Move Coordinator: N. Taylor

ITEMS MOVING		FOR Coordinator Use Only		<b>John Smith's CHECKLIST</b> <input type="checkbox"/> I have entered the quantities herein for each item which I need to have moved. <input type="checkbox"/> All items listed here are currently in one location, and moving to one location. <input type="checkbox"/> Any items from or to another location are represented on a separate sheet. <input type="checkbox"/> I have emptied all cabinets, shelves and drawers. <input type="checkbox"/> I removed keys from all locks, and taped any keys to items I am not keeping. <input type="checkbox"/> I am taking my laptop home. INITIAL: _____
QTY	ITEM	OUT	IN	
	Labeled Crates			
	Labeled Cardboard Boxes			
	Docking Station			
	Monitor #1			
	Monitor #2			
	Keyboard			
	Mouse			
	Speakers			
	Desktop Printer			
	Label Maker			
	Recycle Bin			

**NOTES**

detail packing and tagging methods/tips, move dates and times, checklists, check-out sheet and welcome packet. Staff will be provided with a pre-printed labels with their name and destination room number and a large Ziploc bag for keyboard and IT peripherals.

The JLL on-site project managers will review each employee's check-out sheet against the labeled contents to confirm that they are ready to leave for the move: their desk drawers are completely emptied, their furniture and room keys are in the proper place, their laptop security cable is unlocked, they will be taking their laptop home or have made arrangements with IT to store in a secure room, they have tagged their task chair if moving, their personal items will go home with them or have been moved to a designated room etc. JLL will have previously labeled all furniture. This individual attention serves to alleviate a host of problems during the move and will assure that when the team does the check-ins at the end of the move, the issues will be minimal. Subsequently, the staff get a sense of comfort that their items are in good hands. JLL will carry blank colored labels to label missed crates with office contents and equipment as needed.

As part of the move process, JLL will post color coded placards and move signs at the origination and final destination including the move path with room number ranges, the individual office/workstation assignments and any changes in furniture lay-outs. In addition, the placards have check boxes for on-site move managers to mark off the rooms that have been "checked-out" and ready for packed content removal and "moved" to close the move activities for that space.

#### **F. Relocation Logistics Coordination and On-Site Support**

The contractor shall:

1. Field-verify critical dimensions along the path of travel at both origin and destination (i.e. ensure large items will clear hallways, doorways, elevators). Identify any areas of concern and ensure a clear path of travel will be available and secured for the move.
2. Obtain and confirm elevator capacity levels for all locations.
3. Coordinate loading zone and loading dock access with the Campus Coordinator. Should moving trucks need to utilize areas designated for street parking on either the Monroe Park or MCV Campus, place a request through the VCU Police for a temporary parking permit. Once approved, the VCU Police will post "No Parking" signs 48 hours in advance of the move to advise the public. Ensure vehicular access to the Emergency Department on the MCV Campus is never blocked.
4. Coordinate access to both facilities in preparation for the move.
5. Request temporary reprogramming of door prop alarms with building security as needed.
6. Request elevator keys with property management as needed.
7. Obtain loading dock, elevator and office keys as needed prior to the move for all locations. This is to include security keys for card access systems if required for after-hours access.
8. For leased facilities, obtain the necessary insurance documentation from all delivery vendors as required per the building rules and regulations prior to the relocation.
9. Work closely with the technology group on the disconnection and reconnection of all equipment during each move.
10. Work closely with other 3<sup>rd</sup> party vendors who may be relocating or installing items at the new facility to ensure all trades will have clear access to specific loading and unloading zones during each move day.
11. Walk the new building with the floor plans to review potential changes in walls and doors as well as check clearances that may obstruct the path of travel for placement of items within the space.
12. Conduct origin and destination site walk-through with move supervisor prior to the move date.
13. Coordinate all packing material deliveries and meet the crews on-site for direction on placement of all materials.
14. Provide on-site supervision and mover direction during the course of the relocation.

15. Confirm all items have been labeled correctly and adequately prepared for transport.
16. Complete a walk-through at the origin to ensure all items have been removed in accordance with the relocation plans and schedule.
17. Conduct post-move walk-through to verify correct placement of items prior to releasing the crew.

We will coordinate all move preparation activities, including the required arrangements for security, dock and freight elevators at all sites. As part of our initial needs assessment with the client group and data gathering, we will assess any building access limitations and requirements for special move equipment, such as rigging, fork lift, library carts, skids, or custom packing materials. Field verification of floorplan dimensions will also be performed. We will make provisions for any limitations and special requirements as necessary in accordance with the specific logistics required by relevant parties.

Should any specialist be required for the removal of furniture or laboratory equipment such as an electrician or particular equipment vendor, JLL will identify these needs when discussing the scope prior to the estimate. JLL will work with the technology group regarding disconnection and reconnection of equipment and confirm this task is included in the master relocation schedule. JLL will provide all necessary direction (location, schedule etc.) to the person responsible for the work.

JLL will meet with the building property manager/landlord prior to moves to understand protection expectations, and all building rules and regulations and will confirm all move vendors are aware of and in compliance with such rules. Finally, we will request and receive a Certificate of Insurance for the mover and any other vendors under our oversight.

#### **G. Post-Move Coordination**

The contractor shall:

1. Arrange for the placement of a “Day One Checklist” on all desks to ensure all items have been relocated in accordance with the relocation plans and are functioning properly.
2. Identify items needing adjustment via post-move “fine-tune” crew.
3. Address all post-move related issues with the appropriate vendor.
4. Coordinate and schedule packing material pick-up and rearrange items as needed.
5. Review and approve move contractor invoices for forward to the VCU Project Manager for payment processing.
6. Provide a final compilation of the relocation cost in the form of a final recap.

As each space is completed, JLL move manager, the designated move supervisor and the VCU move liaison, if present, will survey each area to confirm that everything is properly located, with labels facing out for ease of visibility. We use the check-out sheets to verify that all items have arrived into the designated destination. We generally keep the check-out/check-in sheets at the post move support center, however based on VCU’s requirements we will ensure that there will be two copies of the completed check-out /check-in sheets so that one copy remains at each desk and another is at the post move support center, on day one.

The JLL move manager also place at each location and desk a post-move “Adjustment Report” that addresses the general areas where the end users may describe any issues experienced at the time of their arrival. The Report addresses (1) Move issues/misplaced items; (2) Telecommunication/network issues; (3) Furniture and Equipment issues; and (4) General building issues, such as temperature, access, lights, etc. In conjunction with the post-move Support Center these adjustment reports are used in addressing problems on day one after the move.

JLL will manage a “Post Move Support Center”. The Support Center serves as the first “go-to” address for the end-users after their arrival to their new location. We generally prefer to have a physical on-site location as well as a phone line and internet access so that all users have access whether by telecommunication or in person. Our support center functions as a single point of contact to record and document all issues and generate and distribute work orders immediately. By using our proprietary on-line database, and having the reports available electronically, we are able to reach the right services without any delays and verify in-time the status and resolutions to each matter (i.e. new furniture requests or building issues would be passed on to the proper VCU service group or outside vendor.) The on-site fine-tuning crew consisting of movers, IT technicians and furniture installers are utilized to address urgent requests and to promptly collect crates, encouraging unpacking and a safe work place.

### . Sample Post Support Center Report

#### Post-Move Reported Issues

<b>ASSIGNMENT: Approval</b>				
LOCATION / NAM CATEGORY / VENDOR NAME	TICKET NUMBER	DESCRIPTION	NOTES	DATE STATUS
HQ2-11-302 / SHAO,XIAOBO WISH LIST REQUESTS / APPROVAL	TICKET #141	ADDITIONAL WALL OUTLET	DENIED	9/18/2017 COMPLETE
HQ2-11-321 / AIYAR,SHEKHAR SHANKAR WISH LIST REQUESTS / APPROVAL	TICKET #190	WOULD LIKE A COAT CLOSET AND AN ADDITIONAL OUTLET	DENIED BY DON	9/18/2017 COMPLETE
HQ2-11-462.02 / TENALI,NALINI FURNITURE-REUSE / APPROVAL	TICKET #79	MOVE DESK TO FRONT OF ROOM		9/18/2017 PENDING
HQ2-11-492.02 / CHEN,TINGYUN FURNITURE-NEW CASE GOODS / APPROVAL	TICKET #85	ADJUST DESK LOCATION AND REARRANGE FURNITURE.	USER WANTS TO SHIFT SETUP TO WALL FARTHEST FROM THE DOOR AND REMOVE 1 BOOKCASE	9/18/2017 PENDING
HQ2-11-681 / THOMSEN,POUL MATHIAS WISH LIST REQUESTS / APPROVAL	TICKET #197	WOULD LLKE ADDITONAL OUTLET AND CIRCUIT, IF QUESTIONS SPEAK WITH PERSON IN 11-651		9/18/2017 PENDING
HQ2-11-711 / PRADHAN,MAHMOOD FURNITURE-REUSE / APPROVAL	TICKET #221	PLEASE REMOVE FURNITURE AND REPLACE WITH 2 2DRAWER FILE CABINETS		9/18/2017 PENDING

By being on-site JLL can immediately respond to any inquiries with answers, assistance and guidance, allowing the employees to be fully functioning in the new space as soon as possible.

Finally, in addition to arranging for an immediate pick-up of crates and other packing materials on day one, based on the size of the move, the move manager will arrange for at least one or two additional crate pick-ups within the week after the move or s agreed upon with the VCU move liaisons.

In his move services supervisory capacity, the move manager will review each vendor’s labor time sheets as to start and end times and number of crew. It is often helpful to include detailed notes about the daily activity on the paperwork for future reference. Once confirmed JLL would sign and retain a copy of the paperwork. This information will be reviewed against the moving vendor invoices to ensure that the invoices agree with the work performed. Finally, JLL will compile a closing recap of all actual costs compared to the original cost estimate.

### **VIII. MOVE MANAGEMENT REQUIREMENTS:**

#### **A. Project-Initiated Move Management Procedures**

##### **1. Procurement of Move Management Services**



- a. A VCU Planning & Design, Construction or Renovations Project Manager would schedule a meeting with the Move Manager to provide the scope of services, schedule and floor plans for pricing move management services.
- b. The Project Manager shall review the estimate, and if approved, shall engage the Move Manager via EP request.
- c. The Project Manager shall facilitate and attend a meeting between the client group and Move Manager.
- d. The Move Manager shall work directly with the client group to complete all required planning and coordination tasks detailed in the Move Manager Statement of Work.

JLL expects to receive proposal request through two different paths and will serve two different internal VCU customers. In the case of a project initiated move request, JLL will report in to a VCU project manager who will in turn coordinate all internal processes. In the case of a customer initiated request JLL will coordinate with the VCU's general services manager for Physical Plant Support Services and Special Projects and VCU's relocation management services contract administrator through the procurement, handoff (to VCU client) and close-out. In each of these cases the JLL move manager will deliver a "white glove" level of service to the VCU client.

Our overall approach to delivering multiple projects of varying types for VCU will be to constantly reassess and improve JLL service processes while complying with the VCU protocols. Cultures shift, workplace designs are modified, technology changes, project teams are reorganized and so must the provider of relocation services. Having strong processes in place is a best practice but so is periodically adjusting and improving those practices to meet the needs of institutional change. It is through years of interaction with thousands of relocation clients that JLL has honed our approach to relocation engagements like VCU's. Whether being asked to deliver on a project initiated move request or a customer initiated move request JLL's overall approach will include constant assessment of our own practices including:

- Study the existing processes and tools we use to collaborate with the VCU project and relocation team
- Conduct post-move client surveys to evaluate the success of the current processes
- Hold lessons learned meetings on a regular basis to identify any opportunities for improvement
- Introduce JLL's proven best practices, as appropriate
- Review the existing processes and tools that the VCU project and relocation team has in place
- Understand what is working well and identify any methodologies that we feel can be improved upon yielding either better service or maintaining white glove service in a more efficient manner

## Sample lessons learned report

Issue or Success	Type	Responsible	Lesson Learned	Solution
Disposition schedule was a fluid schedule and changed week to week based on JK's completion of available spaces.	Disposition	HHS	The relocation plan indicated a need for disposition meetings, but reoccurring walkthroughs were a more effective way to manage the process on the HHS project as PSC and GSA failed to attend most "scheduled" meetings.	For estimating purposes approximately 25 offices = 1 tractor trailer load. Average pace for a 8-10 hour shift with one elevator for loading was 3-5 trailers. At buildings where there were more than 2 elevators movers were able to load 7-10 trailers per shift.
Spaceworks failed to provide a complete furniture inventory that could be used to support the disposition effort.	Disposition	Spaceworks	JK was required to provide inventory counts per trailer load by hand. The inventory provided by Spaceworks was very generic and did not include a piece by piece inventory of typical offices so it was unusable as "back-up" to the HHS-22 form.	A full/complete inventory should be completed early in the planning process if the disposition effort will be run through GSA or PSC. The inventory needs to be detailed enough that it can be used to "shop" the furniture and used as back-up for any necessary excess paperwork.
PSC Warehouse changed its availability and number of truck loads per day that could be received at the warehouse several times throughout the project.	Disposition	PSC	The schedule of availability to delivery trailers to PSC or GSA needs to be received in writing as early in the process as possible. Fortunately on the HHS process PSC was willing to allow two thirds of the product to go direct to a recycling facility or JK would have been required to hold trailers for 3-4 months after the completion of the disposition due to PSC's availability to process excess furniture.	Clear communication with the customer needs to be set on the number of trailers that must be received by PSC or GSA daily/weekly in order to occur additional cost. The extended trailer rental cost should be highlighted with the customer during the vendor negotiation and contract award. Alternate solutions such as utilizing a recycling facility for identified product should be reviewed and approved as early as possible in the process to allow for more efficient planning.
Fox handled the large scope of file mapping with (5) separate OpDivs utilizing Fox's file mapping templates and best practices as outlined from KB Fox.	File Mapping	Fox	The file mapping template excel document was a helpful tool used during the file mapping process. It was used for sign-off approval of the mapping plan by the customer, for packing/unpacking instructions and for record of the file placement at destination.	Recommend this tool be added to best practice documents if not already done so. Also recommended that Fox received customer sign-off on mapping plans, packing/unpacking logs as records that files where mapped, packed and unpacked appropriately.
ITIO lacked resource to support both the planning and execution associated with a move the size and scope of the HHS project.	IT Coordination	ITIO	Lack of IT participation in the planning effort was clearly detrimental to the overall execution of the IT support throughout the move. While Fox was 100% transparent in the planning process to ITIO throughout the project it was clear that ITIO was over committed and could not support the project. One - Two dedicated technicians was not a sufficient number to support printer mapping, desktop support and telephone support for 200+	For IT support the benchmark should be 8-10 technicians for 16 hours to provide adequate technical support for a move of 200-250 people. If new phone systems are being rolled out as part of the move there should be dedicated training set-up on the first two days following each move to train staff on the new systems.

Upon receipt of the scope of services for a project-initiated move from the VCU project manager, move manager shall prepare an estimate of cost for the defined scope making sure to ask any needed questions or qualifications prior to submission of a quote. The quote will be based on the highest level of support and service for the client group to both avoid interruption and assure the minimal amount of effort is required of the client ("white-glove service").

Upon review and approval of the estimate by the project manager, the move manger shall be engaged via an EP request. Then the project manager will attend a meeting with the move manager to introduce the client group and define the role of the move manager. From this point on, the move manger will work directly with the client group to perform all services in the defined scope of work.

## 2. Procurement of Internal Resources

a. The Move Manager shall provide the VCU Project Manager a list of requirements for internal resources which may include, but is not limited to:

- VCU Desktop Support [PC and Phone Disconnects/Reconnects]
  - VCU Net [Data Connection Adds/Relocations]
  - VCU Telecommunications [Fax Relocations/New Phone Orders]
  - VCU Surplus [Excess Furniture and Equipment Removal]
  - VCU Shop Services [Ex. Lock shop, HVAC, Electrical, Plumbing]
  - VCU OEHS [Hazardous Material Relocation]
- b. The VCU Project Manager proceeds with the appropriate work orders or adds phases to existing work orders for the required resources, followed by notification to the Move Manager.

At VCU the procurement and coordination of internal resources is very important. Some of the internal resources include: VCU Desktop Support, Net, Telecommunications, Surplus, Shop Services, OEHS and any other relevant VCU internal services. The move manager shall define a list of requirements for internal resources and provide these to the VCU project manager. These resources are procured using the VCU work order system operated by the VCU project manager. The move manager shall closely communicate with and include, as needed, these VCU resources at project meetings to assure both support of the resources and seamless execution between internal and external resources. JLL is well versed in working in conjunction with internal client resources. At NCI we work on a continuous basis with NIH's internal CIT team (IT services), their H&S (Health and Safety), OFSM and ORFS (Office of Facility Services and Office of Research Services) in a seamless accord. Our goal is to utilize internal services as much as cost effective for the client to minimize additional expenditure.

### 3. Procurement of External Resources

a. The Move Manager shall generate a scope of work and schedule document for the move.

b. The Move Manager shall issue the documents to the VCU Project Manager who will determine the appropriate move vendor for the project.

c. The Move Manager shall coordinate a meeting with the assigned move vendor to complete a walk-through of the origin and destination facilities in order to develop an estimate for move labor and materials.

d. The Move Manager shall provide the VCU Project Manager the estimate and recommendations. If approved, the VCU Project Manager initiates the EP request with the move vendor to engage move services. The current preferred move vendors include:

- Richmond Commercial Services, VASCUPP Contract
- Hilldrup Moving and Storage, DGS Contract
- Kloke Group, DGS Zone Contract

The Move Manager works directly with the client group, who is responsible for coordination of the following external resources in conjunction with the relocation:

- Biosafety Cabinet Decontaminations/Recertification's
- Hazardous Material Moves/Waste Removal
- Relocation of leased equipment under warranty by 3rd party vendor

As with internal resource procurement, the move Manager is responsible for generating a scope of services for the move vendor and submitting the scope to the VCU project manager for approval. Upon approval, the VCU project manager shall pick a move vendor and the move manager shall coordinate a meeting and walk-through with the assigned move vendor of both the origin and destination sites to allow development of an estimate for move labor and materials and the associated cost. Move manager shall review and vet the cost and after satisfaction that the costs cover the defined scope, will submit the estimate to the VCU project manager. JLL has worked with two of the three VCU preferred vendors at various locations, lastly at the College of William and Mary and is therefore familiar with their methods and performance. (Kloke Group and Hilldrup Moving and Storage.)

Upon engagement of the move vendor, the move manager works directly with the client group. The move manager will also work directly with and coordinate such external resources as Biosafety Cabinet Decontamination/Recertification's, Hazardous Material Moves/Waste Removal and relocation of leased

equipment warranted by a third-party vendor. The move manager shall define a list of requirements for internal resources and provide these to the VCU project manager. These resources are procured using the VCU work order system operated by the VCU project manager. The move manager shall closely communicate with and include, as needed, these VCU resources at project meetings to assure both support of the resources and seamless execution between internal and external resources.

The move manager shall keep the client informed of the detailed move schedule and any changes. At the conclusion of the project, the move manager shall review external vendor invoices for accuracy and upon confirmation forward invoices to VCU's project manager for payment. Finally, the move manager will provide a recap of the scope of services and labor provided and duration of move prior to VCU payment of invoices.

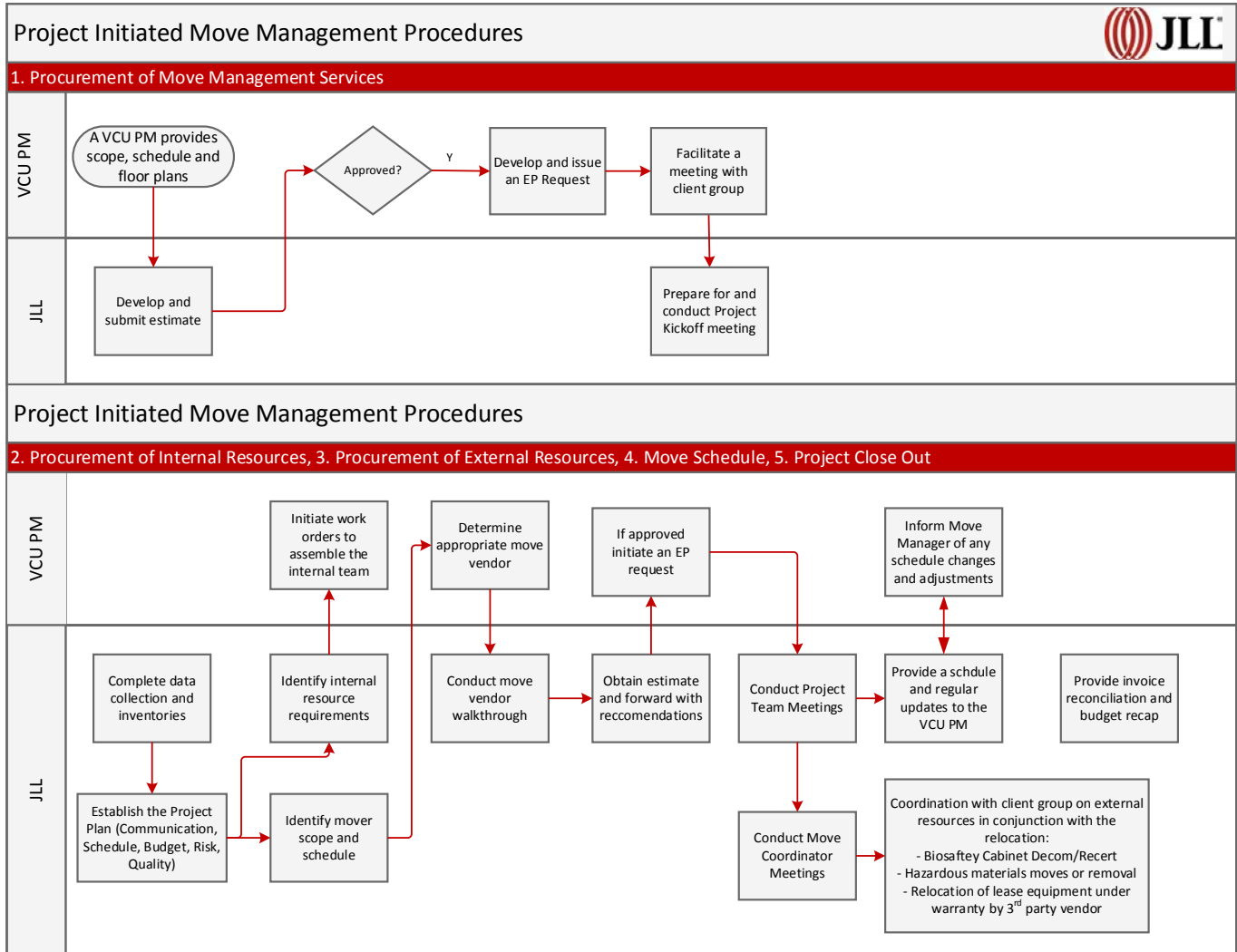
#### **4. Move Schedule**

- a. The Move Manager shall provide the VCU Project Manager with a detailed schedule with regard to the move plan.
- b. The VCU Project Manager will keep the Move Manager informed with regard to any schedule changes and adjustments.

#### **5. Project Close Out**

- a. The Move Manager shall review invoices related to external resources and confirm accuracy before forwarding to VCU Project Manager for payment.
- b. The Move Manager shall provide a recap to the VCU Project Manager at project close of all costs to date.

The following is our understanding of the VCU Project Initiated Move Management Process:



As already discussed in detail in Section VII. C our performance starts with the issue of our overall relocation plans and flexible schedule that is being regularly updated with any changes that may occur due to unforeseen circumstances such as delays in construction or occupancy certification. Our method is based on our best practices exemplified in the above process chart. Each of the activities within the chart above, is quantified with detailed instructions and techniques to achieve successful results. With regards to the move schedule, the JLL move manager will issue prior to each move a detailed daily and hourly move schedule that shows precise time and locations for following activities. A sample of such detailed “Move Sequence Table” is shown above: :

- Delivery of packing materials and crates and location where these are stored
- Final meeting/town hall with affected personnel on packing, tagging and answering outstanding questions
- Placement of placards with room numbers, space layouts and directional signs with the move path
- Completion and verification of the check-out sheets and content labeling

- Timing of specialized collections packing such as library contents, artwork, filing, chemicals, HazMat etc.
- Schedule for biosafety cabinets' decontamination and the requisite period of off-gassing
- Timing of specialty vendor services associated with research equipment relocation
- Start of IT and equipment disconnects
- Start of removal and loading of contents into trucks
- Staging of contents in case of swing moves and multiple restacks
- Delivery and placement of IT and research equipment, its reconnection, calibration and testing
- Delivery of office and personal contents
- Check-in procedures
- Punch list surveys and final confirmation of move process completion
- Day-One post move Support Center

While the post move Support Center activities are described in a different section of this document (Section VII.G, starting on page 14), the close-out activities need further detailed explanation.

As mentioned above, at the start of the project the move manager issues an estimate for each task order. This budget estimate is further drilled down during the progress of each task order and/or project reflecting any updates and receivables.

At the end of each task order and/or project, the move manager reviews all activities such as hours worked and services delivered, against the invoices that are submitted by all external resources. Execution of the final punch list is also part of this review and confirmation process. The actual costs are entered into the budget spreadsheet for final reconciliation, payment schedule and presented to the VCU project manager.

Together with the final cost analysis, the move manager will issue a summary of the task order/project activities and any lessons learned. On large or complex relocation and installation projects, we will hold a formal "Lessons Learned" session with the key participants to review their final conclusion about the implemented process and will include their comments in the report. Finally, it is JLL practice to conduct a post-move survey to ensure quality of deliverables. The final document including all such input is published in the recap, presented to the VCU project manager and becomes JLL's additional tool in our Best Practices arsenal for future use.

## **B. Customer-Initiated Move Management Procedures**

### **1. Client Initiates Request via QuickFM (see attachment B for definition and web link)**

**a. The VCU client initiates a request for move services via the QuickFM system.**

**b. The QuickFM Customer Service Representative forwards all move services requests to VCU's General Services Manager for Physical Plant Support Services and Special Projects.**

c. VCU's General Services Manager for Physical Plant Support Services and Special Projects and VCU's Relocation Management Services Contract Administrator will meet with the client(s) to determine the relocation scope of work.

d. Should the project include any of the following parameters, move management services shall be required:

- Evening and/or Weekend Move Management
- Multiple Phases/Multiple Facilities
- High Volume (large number of employees; high volume of contents and furnishings)
- Inventory and Space Planning
- Leased Property; Property Management Coordination

If move management services are required, VCU's Relocation Management Services Contract Administrator will place a formal request for proposal with the Move Management firm.

## 2. Procurement of Move Management Services

a. VCU's Relocation Management Services Contract Administrator facilitates and attends a meeting with the Move Manager and/or the client to provide the scope of services, schedule and floor plans for pricing move management services.

b. VCU's Relocation Management Services Contract Administrator reviews the estimate for move management services for approval and forward to the client group. Once the client approves the quote and provides an index code, the quote and index code would be issued to VCU's General Services Manager for Physical Plant Support Services and Special Projects to engage move management services via an EP request.

c. The Move Manager works directly with the client group to complete all required planning and coordination tasks detailed in the Move Manager Statement of Work.

## 3. Procurement of Internal Resources

a. The Move Manager shall provide the client with a list of requirements for internal resources which could include, but is not limited to:

- VCU Desktop Support [PC and Phone Disconnects/Reconnects]
- VCU Net [Data Connection Adds/Relocations]
- VCU Telecommunications [Fax Relocations/New Phone Orders]
- VCU Surplus [Excess Furniture and Equipment Removal]
- VCU Shop Services [Ex. Lockshop, HVAC, Electrical, Plumbing]
- VCU OEHS [Hazardous Material Relocation]

The client proceeds with the appropriate work orders for the required resources.

## 4. Procurement of External Resources

a. The Move Manager shall generate a scope of work and schedule document for the move.

b. The Move Manager shall issue the document to VCU's General Services Manager for Physical Plant Support Services and Special Projects, who will determine the appropriate move vendor for the project.

c. The Move Manager shall coordinate a meeting with the move vendor to complete a walk-through of the origin and destination facilities in order to develop an estimate for move labor and materials.

d. The Move Manager shall provide the client the estimate and recommendations. If approved, the Move Manager generates a request through VCU's General Services Manager for Physical Plant Support Services and Special Projects to initiate the EP request to engage move services. The request must include detailed specifics with regard to the scope of services, schedule and the client-provided budget code. The current preferred move vendors include:

- Richmond Commercial Services, VASCUPP Contract
- Hilldrup Moving and Storage, DGS Contract
- Kloke Group, DGS Zone Contract

The Move Manager shall work directly with the client group, who is responsible for coordination of the following external resources in conjunction with the relocation:

- Biosafety Cabinet Decontaminations/Recertification's
- Hazardous Material Moves/Waste Removal
- Relocation of leased equipment under warranty by 3<sup>rd</sup> party vendor.

## 5. Move Schedule

a. The Move Manager shall provide the client a detailed schedule with regard to the move plan.

b. The client keeps the Move Manager informed with regard to any schedule changes and adjustments.

## 6. Project Close Out

a. The Move Manager shall review invoices related to external resources and confirms accuracy before forwarding to VCU's General Services Manager for Physical Plant Support Services and Special Projects for payment.

b. The Move Manager shall provide a recap to VCU's General Services Manager for Physical Plant Support Services and Special Projects at project close with regard to the scope of services and move labor provided as well as move duration, in order for VCU to proceed with appropriate and timely invoice approvals and processing.

## Customer-Initiated Move Management Procedures

For customer Initiated move management requirements; the client makes a request via the QuickFM system and a customer service representative forwards the requests to VCU's general services manager for Physical Plant Support Services and Special Projects which will meet with the client to determine the scope of work required. The move manager will not be engaged unless any of the following services/ situations are required/present:

- Evening and/or weekend move management
- Multiple phases/multiple facilities
- High volume (large number of employees; high volume of contents and furnishings)



- Inventory and space planning
- Leased property; property management coordination

If the move manager services are required, the VCU relocation services contract administrator will formally request a quote from the move manager, forward quote for approval by the client group and provide an index code to be issued to VCU's general services manager who will engage move management services via an EP request. As with the project Initiated procedures, the move manager then works directly with the client, procures internal and external resources in the same or much the same manner. The exception being that the move manager shall provide the client the estimate and recommendations. If approved, the move manager generates a request through VCU's general services manager for Physical Plant Support Services and Special Projects to initiate the EP request to engage move services. Here the request must include detailed scope of services, schedule and client-provided budget code.

The move manager shall keep the client informed of the detailed move schedule and any changes. At the conclusion of the project, move manager shall review external vendor invoices for accuracy and upon confirmation forward invoices to VCU's general services manager for Physical Plant Support Services and Special Projects for payment. Finally, the move manager will provide a recap of the scope of services and labor provided and duration of move prior to VCU payment of invoices.

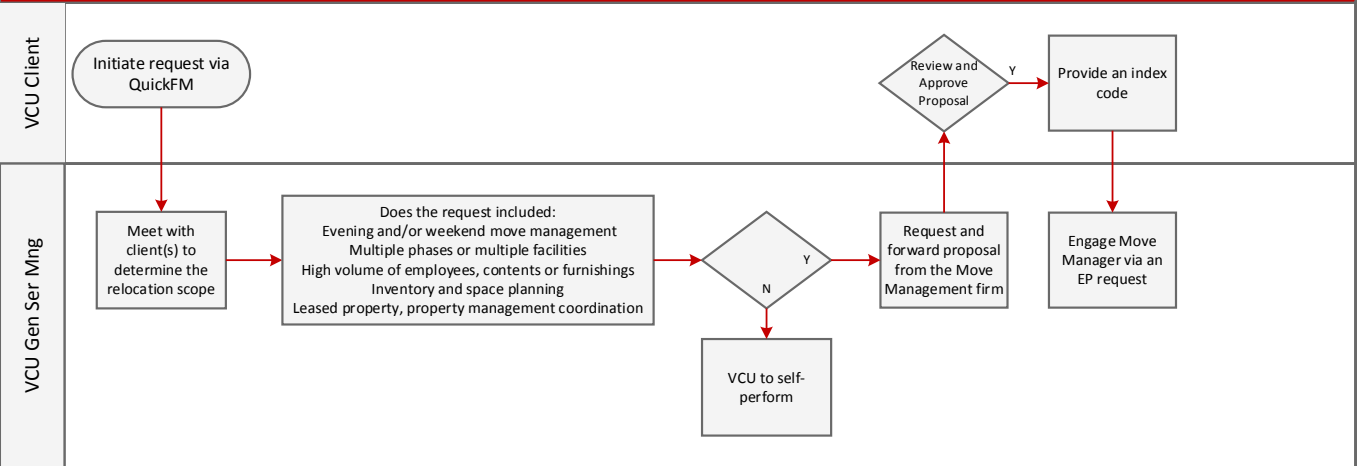
Similar FM system is employed at NCI, where our on-site team members are contacted by the NCI project manager when a ticket is generated by an NCI department. The JLL team member discusses the scope with the NCI project manager and the end user and develops a cost estimate for the work. NCI departments generate approximately 250 tickets per year, utilizing as many as three full time JLL relocation professionals on a daily basis.

The following is our understanding of the VCU Client Initiated Move Management Process:



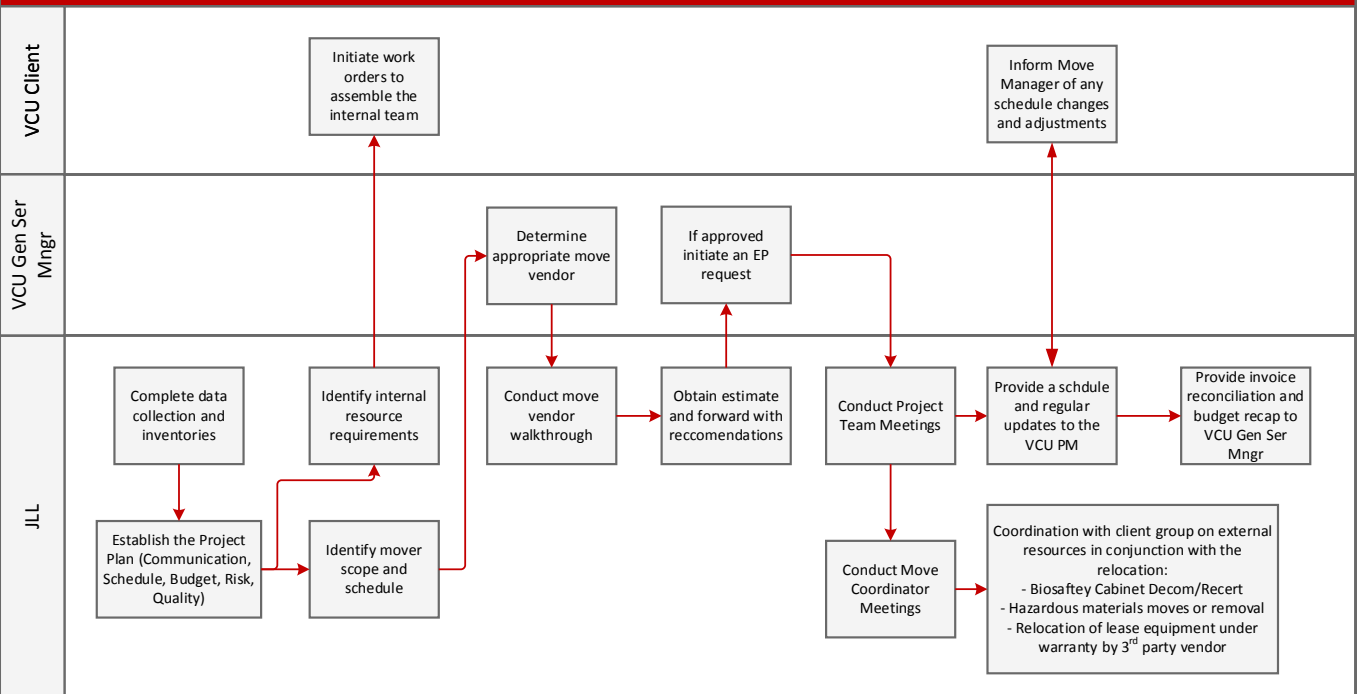
Customer Initiated Move Management Procedures

1. Client Initiates Request via QuickFM,, 2. Procurement of Move Management Services



Customer Initiated Move Management Procedures

3. Procurement of Internal Resources, 4. Procurement of External Resources, 5. Move Schedule, 6. Project Close Out



### Section 3: References

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#### Reference #1: Harvard University

Organization	Harvard University
Address	60 John F. Kennedy Street Cambridge, MA 02138
Contact person	Name: John F. Hollister Title: Senior Capital Project Manager Email: <a href="mailto:john_hollister@harvard.edu">john_hollister@harvard.edu</a> Phone: 617-998-5530

#### Reference #2: College of William and Mary

Organization	College of William and Mary
Address	Williamsburg, VA
Contact person	Name: Kathy L. Mabe, VCO Title: Senior Procurement Officer Email: <a href="mailto:klmabe@wm.edu">klmabe@wm.edu</a> Phone: 757-221-1636  Name Mark Ballman, P.E. Title: Project Manager, Facilities, Planning, Design and Construction Division Email: <a href="mailto:mpballman@wm.edu">mpballman@wm.edu</a> Phone: 757-221-2360

#### Reference #3: National Cancer Institute

Organization	National Cancer Institute
Address	37 Convent Drive Bethesda, MD 20892
Contact information	Name: Yolanda Koh, RA Title: Project Manager mail: <a href="mailto:kohyc@mail.nih.gov">kohyc@mail.nih.gov</a> Phone: 240-276-5030

## Section 4: Pricing

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### ATTACHMENT A Revised Pricing

Senior Move Manager Hourly Rate	\$120.00
Move Manager Hourly Rate	\$105.00
Move Manager Assistant Hourly Rate	\$92.00
Interior Designer Hourly Rate	\$102.00
Note the hourly rate is to include all cost (including but not limited to supervision, office supplies, transportation, miscellaneous and incidentals)	

Acknowledged:

By (Signature): 

Name Printed: Ilana Breslaw

Title: VP | RPM Sr. Team Lead  
JLL, PDS|RPM Services

Email: [Ilana.Breslaw@am.jll.com](mailto:Ilana.Breslaw@am.jll.com)

## Section 5: Current and Projected Work Load

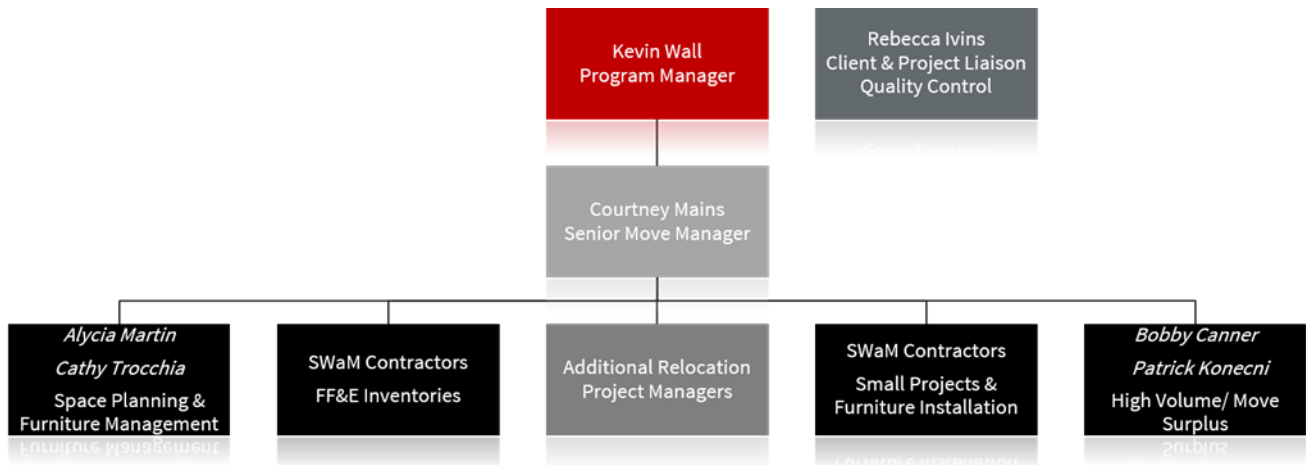
We are proposing, depending on client work volume and requirements, to have a program manager to coordinate the entire VCU service delivery program who will devote the appropriate time and effort to this important contract. In addition, we are proposing, depending on client work volume and requirements, a senior relocation project manager that is available to dedicate 100% of his time to performing VCU relocation management, when required.

We have the following specific staff that will provide the skills and services noted. These individuals are variable resources that will be used as needed for specific task orders. We understand there is a high probability of multiple projects occurring simultaneously and we have the depth of resources to support VCU even at the highest work level periods.

Our local subcontractors will fill specialty and peak needs, particularly providing expertise in high density storage and electronic inventory, small project work and furniture installation supervision.

Our proposed Organizational Chart is shown below.

### Organizational Chart



## Section 6: SWaM Form (Appendix I)

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### SWaM Form (Appendix I)

#### PARTICIPATION IN STATE PROCUREMENT TRANSACTIONS SMALL BUSINESSES AND BUSINESSES OWNED BY WOMEN AND MINORITIES

The following definitions will be used in completing the information contained in this Appendix.

#### Definitions

- **Small business** is 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. Nothing in this definition prevents a program, agency, institution or subdivision from complying with the qualification criteria of a specific state program or federal guideline to be in compliance with a federal grant or program.
- **Women-owned business** is a business concern which is at least 51 percent owned by one or more women who are U.S. citizens or legal resident aliens, or in the case of a corporation, partnership or limited liability company or other entity, at least 51 percent of the equity ownership interest in which is owned by one or more women, and whose management and daily business operations are controlled by one or more of such individuals.
- **Minority-owned business** is a business concern which is at least 51 percent owned by one or more minorities or in the case of a corporation, partnership or limited liability company or other entity, at least 51 percent of the equity ownership interest in which is owned by one or more minorities and whose management and daily business operations are controlled by one or more of such individuals.
- **Minority Individual:** “Minority” means a person who is a citizen of the United States or a legal resident alien and who satisfies one or more of the following definitions:
  - “Asian Americans” means all persons having origins in any of the original peoples of the Far East, Southeast Asia, the Indian subcontinent, or the Pacific Islands, including but not limited to Japan, China, Vietnam, Samoa, Laos, Cambodia, Taiwan, Northern Marinas, the Philippines, U. S. territory of the Pacific, India, Pakistan, Bangladesh and Sri Lanka and who are regarded as such by the community of which these persons claim to be a part.
  - “African Americans” means all persons having origins in any of the original peoples of Africa and who are regarded as such by the community of which these persons claim to be a part.
  - “Hispanic Americans” means all persons having origins in any of the Spanish speaking peoples of Mexico, South or Central America, or the Caribbean Islands or other Spanish or Portuguese cultures and who are regarded as such by the community of which these persons claim to be a part.
  - “Native Americans” means all persons having origins in any of the original peoples of North America and who are regarded as such by the community of which these persons claim to be a part or who are recognized by a tribal organization.
  - “Eskimos and Aleuts” means all persons having origins in any of the peoples of Northern Canada, Greenland, Alaska, and Eastern Siberia and who are regarded as such in the community of which these persons claim to be a part.

**PARTICIPATION BY SMALL BUSINESSES, BUSINESSES OWNED BY WOMEN BUSINESSES OWNED BY MINORITIES**

**This appendix should only be completed by firms that are not Virginia Department of Minority Business Enterprise (DMBE) certified small businesses.**

**JLL certifies that it will involve Small Businesses, Women-Owned Businesses, and/or Minority-Owned Businesses (SWAM) in the performance of this contract either as part of a joint venture, as a partnership, as Subcontractors or as suppliers.**

**List the names of the SWAM Businesses your firm intends to use and identify the direct role of these firms in the performance of the contract. State whether the firm is a Small Business (SB), Women-Owned (WO), or Minority-Owned (MO).**

Name of Businesses:	SB, WO, MO, DBE	Role in Contract	Address
Dynamic Facility Designs, LLC	SB, WO, MO, DBE/MBE	Move Management planning, coordination and move supervision execution	2324 North Dickerson Street Arlington, VA 22207
Project Move Up	SB, WO	Move Management planning, coordination and move supervision execution	841 Crestwood Dr. Blacksburg, VA 24060
Business Interiors & Moving Services, LLC	SB, MO, DBE/MBE	Move Management inventory and labeling and surplus management	5636 E Virginia Beach Boulevard Norfolk, VA 23502
Blue Ridge Space Innovators, Ltd.	SB, MO	High density storage, Library shelving, Mobile shelving assessment and move planning	803 Kenmore Rd Amherst, VA 24521

**Commitment for utilization of DMBE SWAM Businesses**

**NOTE:** 15% of total contract amount that will be performed by DMBE certified SWAM businesses.

**Identify the individual responsible for submitting SWAM reporting information to VCU:**

Name Printed: Courtney Mains

Email: [Courtney.Mains@am.jll.com](mailto:Courtney.Mains@am.jll.com)

Phone: 804-418-2334

JLL understands and acknowledge that the percentages stated above represent a contractual commitment by the JLL. Failure to achieve the percentage commitment will be considered a breach of contract and may result in contract default.

Acknowledged:

By (Signature): 

Name Printed: Ilana Breslaw

Title: VP | RPM Sr. Team Lead  
JLL, PDS|RPM Services

Email: [Ilana.Breslaw@am.jll.com](mailto:Ilana.Breslaw@am.jll.com)

Note: Small, Minority and/or Women-owned business sub-contractors are required to become certified and maintain certification through the Virginia Department of Minority Business Enterprise (DMBE; <http://www.dmb.e.virginia.gov/swamcert.html> ) to fulfill the JLL's commitment for utilization.



## Section 7: Invoicing and Payment Requirements (Appendix II)

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### Invoicing and Payment (Appendix II):

The Contractor shall submit a fully itemized invoice to Virginia Commonwealth University, Accounts Payable and Support Services, Box 980327, Richmond, VA 23298-0327, that, at minimum, includes the following information: the Virginia Commonwealth University purchase order number; a description of the goods or services provided; quantities; unit prices; extended prices; and total prices. Payment will be issued in accordance with the payment method selected below and with the Commonwealth of Virginia Prompt Payment Legislation. Upon request by VCU, the Contractor shall submit invoices electronically using the Ariba Network or other e-commerce channel utilized by VCU; and agrees to comply, within reason, with any future e-commerce initiatives including, but not limited to: procurement, procurement content, sourcing or any other electronic procurement and sourcing solutions. Questions regarding this method of invoicing should be sent to: [ecommerce@vcu.edu](mailto:ecommerce@vcu.edu).

Payment: VCU Procurement Services is automating the payment process to the greatest extent possible. Contractors are encouraged to accept payment electronically through the commercial card program. Please review the payment methods described below and select one for your firm. By selecting the payment method below, Contractor acknowledges that the selected payment method is **not specific to the contract resulting from this solicitation and will apply to all payments made to the Contractor** by Virginia Commonwealth University. For example, if the Contractor has an existing contract(s) and is currently receiving payment by paper check, and the Contractor is now electing to receive payment by the commercial card, **all payments** will be made using the commercial card once the commercial card payment process is implemented for the firm.

### Payment Methods

- **Electronically through a Wells Fargo Visa commercial card:** Payment will be made ten days (10) after receipt of a proper invoice for the amount of payment due, or ten (10) days after receipt of the goods or services, whichever is later. It is the Contractor's responsibility to contact its banking institutions to determine any credit limit that may restrict the payment of invoices. It is the Contractor's responsibility to have its credit limit raised as necessary to facilitate the timely payment of all invoices. Invoices exceeding the Contractor's credit limit will be returned unpaid. Failure to accept the commercial card after award of contract will be considered a contract compliance issue and will be addressed accordingly. In addition, invoices will be returned without payment until the Contractor can accept the payment through the commercial card
- **ACH:** Electronic payment via automated clearing house (ACH) to the vendor provided bank account of record. Payment is processed thirty (30) days after receipt of a proper invoice for the amount of payment due, or thirty (30) days after receipt of the goods or services, whichever is later. Additional information about ACH payments is available at: <http://treasury.vcu.edu/banking/vendor-ach/>.

Contractor must indicate the method of payment selected: \_\_\_\_\_ **Commercial Card Payment (Wells Fargo VISA)**

Automated Clearing House (ACH)

Invoicing and Payment Method Acknowledgement:

Signature:  \_\_\_\_\_

Name Printed: Ilana Breslaw

Title: VP | RPM Sr. Team Lead  
JLL, PDS|RPM Services

Name of Firm: Jones Lang LaSalle Americas, Inc.

Date: 09/14/2017

Please identify the following contact information for the individual who will serve **as the appropriate point of contact within your company to be contacted by VCU Accounts Payable to implement the electronic invoicing and payment processes:**

Name of the individual: Steven Pfannenstiel

Title: Billing Analyst

Mailing address: 1801 K Street NW, Suite 1000 Washington, DC 20006 United States

Email address: [Steven.Pfannenstiel@am.jll.com](mailto:Steven.Pfannenstiel@am.jll.com)

Phone number: 202-945-7461

Fax number: Not Applicable

## Section 8: Exceptions to terms and conditions (Appendix III)

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### Appendix III: Exceptions – see below.

Any and all exceptions to the terms, conditions or specifications of this RFP must be clearly stated, section by section, in the space provided below. Exceptions should be numbered to coincide with the RFP numbering and be provided in the sequence in which the item appears in the RFP. If more space is required, please copy this page or attach separate sheets. Please note VCU, at its discretion, reserves the right to consider proposals containing significant exceptions to be non-responsive.

JLL respectfully asks VCU to consider making the following modifications to the contract:

Q.INDEMNIFICATION: Contractor agrees to indemnify, defend and hold harmless the Commonwealth of Virginia, its officers, agents, and employees from any third party claims, damages and actions of any kind or nature, whether at law or in equity, arising ~~from or caused by the use of any materials, goods, or equipment of any kind or nature furnished by the Contractor/any services of any kind or nature furnished by the Contractor,~~ from the Contractor's negligence or willful misconduct under the Contract, provided that such liability is not attributable to the sole negligence of the using agency or to failure of the using agency to use the materials, goods, or equipment in the manner already and permanently described by the Contractor on the materials, goods, or equipment delivered.

U.WARRANTY (COMMERCIAL): ~~The Contractor agrees that the supplies or services furnished under any award resulting from this solicitation shall be covered by the most favorable commercial warranties the Contractor gives any customer for such supplies or services and that the rights and remedies provided therein are in addition to and do not limit those available to the Commonwealth by any other clause of this solicitation. A copy of this warranty must be furnished with the proposal.~~ Contractor does not have a formal service warranty but warrants that services will be performed in a good and workmanlike manner, consistent with customary business practices provided to its most favorable commercial customers.

JLL respectfully asks VCU to consider allowing the following paragraph to be added to the terms:

E.E. Consequential Damages. Except to the extent of the obligations in the paragraph "Hold Harmless," neither party shall be liable, under any circumstances for any anticipatory or lost profit, special, consequential, punitive, exemplary, incidental or indirect damages of any kind (collectively "non-direct damages") resulting from its performance or non-performance of its obligations under the contract even if such non-direct damages are attributed to breach of the contract, tort or negligence or otherwise caused; such party has been advised of the possibility of such non-direct damages; or under applicable law, any such non-direct damages are considered direct damages.

Please see below for our completed Representations and Certifications.

- A. **PURCHASING MANUAL:** This RFP is subject to the provisions of the Commonwealth of Virginia's Purchasing Manual for Institutions of Higher Education and their Vendors and any revisions thereto, which are hereby incorporated into this contract in their entirety. A copy of the manual is available for review at the VCU Procurement Services Office. In addition, the manual may be accessed electronically at <http://procurement.vcu.edu/> or a copy can be obtained by calling VCU Procurement Services at (804)828-1077.
- B. **APPLICABLE LAW AND COURTS:** This RFP and any resulting Contract shall be governed in all respects by the laws of the Commonwealth of Virginia and any litigation with respect thereto shall be brought in the courts of the Commonwealth. The Contractor shall comply with all applicable federal, state and local laws, rules and regulations.
- C. **ANTI-DISCRIMINATION:** By submitting their Proposals, Offerors certify to the Commonwealth and to VCU that they will conform to the provisions of the Federal Civil Rights Act of 1964, as amended, as well as the Virginia Fair Employment Contracting Act of 1975, as amended, where applicable, the Virginians With Disabilities Act, the Americans With Disabilities Act and Section 2.2-4311 of the *Virginia Public Procurement Act*. If the award is made to a faith-based organization, the organization shall not discriminate against any recipient of goods, services, or disbursements made pursuant to the contract on the basis of the recipient's religion, religious belief, refusal to participate in a religious practice, or on the basis of race, age, color, gender or national origin and shall be subject to the same rules as other organizations that contract with public bodies to account for the use of the funds provided; however, if the faith-based organization segregates public funds into separate accounts, only the accounts and programs funded with public funds shall be subject to audit by the public body. (*Code of Virginia*, § 2.2- 4343.1).

In every Contract over \$10,000 the provisions in 1. and 2. below apply:

1. During the performance of this Contract, the Contractor agrees as follows:
  - a) Virginia Commonwealth University is an equal opportunity/affirmative action institution providing access to education and employment without regard to age, race, color, national origin, gender, religion, sexual orientation, veteran's status, political affiliation or disability. As such, the Contractor will not discriminate against any employee or applicant for employment because of age, race, color, national origin, gender, religion, sexual orientation, veteran's status, political affiliation or disability or any other basis prohibited by state law related to discrimination in employment, except where there is a bona fide occupational qualification reasonably necessary to the normal operation of the Contractor. The Contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices setting forth the provisions of this nondiscrimination clause.
  - b) The Contractor, in all solicitations or advertisements for employees placed by or on behalf of the Contractor, will state that such Contractor is an equal opportunity employer.

- c) Notices, advertisements and solicitations placed in accordance with federal law, rule or regulation shall be deemed sufficient for the purpose of meeting these requirements.
  2. The Contractor will include the provisions of 1. above in every subcontract or purchase order over \$10,000, so that the provisions will be binding upon each subcontractor or vendor.
- D. ETHICS IN PUBLIC CONTRACTING: By submitting their Proposals, Offerors certify that their Proposals are made without collusion or fraud and that they have not offered or received any kickbacks or inducements from any other Offeror, supplier, manufacturer or subcontractor in connection with their Proposal, and that they have not conferred on any public employee having official responsibility for this procurement transaction any payment, loan, subscription, advance, deposit of money, services or anything of more than nominal value, present or promised, unless consideration of substantially equal or greater value was exchanged.
- E. IMMIGRATION REFORM AND CONTROL ACT OF 1986: By submitting their Proposals, Offerors certify that they do not and will not during the performance of this Contract employ illegal alien workers or otherwise violate the provisions of the Federal Immigration Reform and Control Act of 1986.
- F. DEBARMENT STATUS: By submitting their Proposals, Offerors certify that they are not currently debarred by the Commonwealth of Virginia from submitting proposals on contracts for the type of goods and/or services covered by this solicitation, nor are they an agent of any person or entity that is currently so debarred.
- G. ANTITRUST: By entering into a Contract, the Contractor conveys, sells, assigns, and transfers to the Commonwealth of Virginia all rights, title and interest in and to all causes of the action it may now have or hereafter acquire under the antitrust laws of the United States and the Commonwealth of Virginia, relating to the particular goods or services purchased or acquired by the Commonwealth of Virginia under said contract.
- H. MANDATORY USE OF STATE FORM AND TERMS AND CONDITIONS: Failure to submit a Proposal on the official VCU Form provided for that purpose may be a cause for rejection of the Proposal. Modification of, or additions to, the General Terms and Conditions of the solicitation may be cause for rejection of the Proposal; however, the Commonwealth reserves the right to decide, on a case by case basis, in its sole discretion, whether to reject such a Proposal.
- I. PAYMENT:
1. To Prime Contractor:
    - a) Invoices for items ordered, delivered and accepted shall be submitted by the Contractor directly to the payment address shown on the purchase order/Contract. All invoices shall show the VCU Contract number and/or purchase order number; social security number (for individual Contractors) or

the federal employer identification number (for proprietorships, partnerships, and corporations).

- b) Any payment terms requiring payment in less than thirty (30) days will be regarded as requiring payment thirty (30) days after invoice or delivery, whichever occurs last. This shall not affect offers of discounts for payment in less than thirty (30) days, however.
- c) All goods or services provided under this Contract or purchase order, that are to be paid for with public funds, shall be billed by the Contractor at the contract price, regardless of which public institution is being billed.
- d) The following shall be deemed to be the date of payment: the date of postmark in all cases where payment is made by mail, or the date of offset when offset proceedings have been instituted as authorized under the Virginia Debt Collection Act.
- e) Unreasonable Charges. Under certain emergency procurements and for most time and material purchases, final job costs cannot be accurately determined at the time orders are placed. In such cases, contractors should be put on notice that final payment in full is contingent on a determination of reasonableness with respect to all invoiced charges. Charges which appear to be unreasonable will be researched and challenged, and that portion of the invoice held in abeyance until a settlement can be reached. Upon determining that invoiced charges are not reasonable, VCU shall promptly notify the contractor, in writing, as to those charges which it considers unreasonable and the basis for the determination. A Contractor may not institute legal action unless a settlement cannot be reached within thirty (30) days of notification. The provisions of this Section do not relieve VCU of its prompt payment obligations with respect to those charges that are not in dispute (Code of Virginia, § 2.2-4363).

## 2. To Subcontractors:

- a) Contractor awarded a contract under this RFP is hereby obligated:
  - i. To pay the Subcontractor(s) within seven (7) days of the Contractor's receipt of payment from VCU for the proportionate share of the payment received for work performed by the Subcontractor(s) under the contract; or
  - ii. To notify VCU and the Subcontractor(s), in writing, of the Contractor's intention to withhold payment and the reason.
- b) The Contractor is obligated to pay the Subcontractor(s) interest at the rate of one percent per month (unless otherwise provided under the terms of the contract) on all amounts owed by the Contractor that remain unpaid seven (7) days following receipt of payment from VCU, except for amounts withheld as stated in 2. above. The date of mailing of any payment by U.S. Mail is deemed to be payment to the addressee. These provisions apply to each sub-tier

Contractor performing under the primary contract. A Contractor's obligation to pay an interest charge to a Subcontractor may not be construed to be an obligation of VCU.

- J. **PRECEDENCE OF TERMS:** Paragraphs A-J of these General Terms and Conditions shall apply in all instances. In the event there is a conflict between any of the other General Terms and Conditions and any Special Terms and Conditions in this solicitation, the Special Terms and Conditions shall apply.
- K. **QUALIFICATIONS OF OFFERORS:** VCU may make such reasonable investigations as deemed proper and necessary to determine the ability of the Offeror to perform the services/furnish the goods and the Offeror shall furnish to VCU all such information and data for this purpose as may be requested. VCU reserves the right to inspect Offeror's physical facilities prior to award to satisfy questions regarding the Offeror's capabilities. VCU further reserves the right to reject any Proposal if the evidence submitted by, or investigations of, such Offeror fails to satisfy VCU that such Offeror is properly qualified to carry out the obligations of the Contract and to provide the services and/or furnish the goods contemplated therein.
- L. **TESTING AND INSPECTION:** VCU reserves the right to conduct any test/inspection it may deem advisable to assure goods and services conform to the specifications.
- M. **ASSIGNMENT OF CONTRACT:** A Contract shall not be assignable by the Contractor in whole or in part without the written consent of the VCU Director of Procurement Services.
- N. **CHANGES TO THE CONTRACT:** Changes can be made to the Contract in any one of the following ways:
1. The parties may agree in writing to modify the scope of the Contract. An increase or decrease in the price of the Contract resulting from such modification shall be agreed to by the parties as a part of their written agreement to modify the scope of the Contract.
  2. The VCU Procurement Services Department may order changes within the general scope of the Contract at any time by written notice to the Contractor. Changes within the scope of the contract include, but are not limited to, things such as services to be performed, the method of packing or shipment, and the place of delivery or installation. The Contractor shall comply with the notice upon receipt. The Contractor shall be compensated for any additional costs incurred as the result of such order and shall give VCU a credit for any savings. Said compensation shall be determined by one of the following methods:
    - a) By mutual agreement between the parties in writing; or
    - b) By agreeing upon a unit price or using a unit price set forth in the Contract, if the work to be done can be expressed in units, and the Contractor accounts for the number of units of work performed, subject to the VCU's right to audit the Contractor's records and/or to determine the correct number of units independently; or

- c) By ordering the Contractor to proceed with the work and keep a record of all costs incurred and savings realized. A markup for overhead and profit may be allowed if provided by the Contract. The same markup shall be used for determining a decrease in price as the result of savings realized. The Contractor shall present VCU with all vouchers and records of expenses incurred and savings realized. VCU shall have the right to audit the records of the Contractor as it deems necessary to determine costs or savings. Any claim for an adjustment in price under this provision must be asserted by written notice to VCU within thirty (30) days from the date of receipt of the written order from VCU. If the parties fail to agree on an amount of adjustment, the question of an increase or decrease in the Contract price or time for performance shall be resolved in accordance with the procedures for resolving disputes provided by the Disputes Clause of this Contract or, if there is none, in accordance with the disputes provisions of the Commonwealth of Virginia's Purchasing Manual for Institutions of Higher Education and Their Vendors. Neither the existence of a claim or a dispute resolution process, litigation or any other provision of this Contract shall excuse the Contractor from promptly complying with the changes ordered by the VCU Procurement Service Office or with the performance of the Contract generally.
- O. **DEFAULT:** In case of failure to deliver goods or services in accordance with the Contract terms and conditions, VCU after due oral or written notice, may procure them from other sources and hold the Contractor responsible for any resulting additional purchase and administrative costs. This remedy shall be in addition to any other remedies which VCU may have in law or equity.
- P. **USE OF BRAND NAMES:** Unless otherwise provided in this RFP, the name of a certain brand, make or manufacturer does not restrict Offerors to the specific brand, make or manufacturer named, but conveys the general style, type, character, and quality of the article desired. Any article, which the public body, in its sole discretion, determines to be the equal of that specified, considering quality, workmanship, economy of operation, and suitability for the purpose intended, shall be accepted. The Offeror is responsible to clearly and specifically identify the product being offered and to provide sufficient descriptive literature, catalog cuts and technical detail to enable VCU to determine if the product offered meets the requirements of the solicitation. This is required even if offering the exact brand, make or manufacturer specified. Unless the Offeror clearly indicates in its proposal that the product offered is an "equal" product, such proposal will be considered to offer the brand name product referenced in the RFP.
- Q. **TRANSPORTATION AND PACKAGING:** By submitting their Proposals, all Offerors certify and warrant that the price offered for FOB Destination includes only the actual freight rate costs at the lowest and best rate and is based upon the actual weight of the goods to be shipped. Except as otherwise specified herein, standard commercial packaging, packing and shipping containers shall be used. All shipping containers shall be legibly marked or labeled on the outside with purchase order number, commodity description, and quantity. Further, Offeror shall bear the risk of loss until the goods and equipment until VCU accepts Delivery of them.



R. **INSURANCE:** By signing and submitting a Proposal under this RFP, the Offeror certifies that if awarded the Contract, it will have the following insurance coverages at the time the Contract is awarded. For construction contracts, if any Subcontractors are involved, the subcontractor will have workers' compensation insurance in accordance with §§ 2.2-4332 and 65.2-800 et seq. of the *Code of Virginia*. The Offeror further certifies that the Contractor and any Subcontractors will maintain these insurance coverages during the entire term of the Contract and that all insurance coverage will be provided by insurance companies authorized to sell insurance in Virginia by the Virginia State Corporation Commission.

Minimum Insurance Coverages and Limits Required for Most Contracts:

1. Worker's Compensation - Statutory requirements and benefits. Coverage is compulsory for employers of three or more employees, to include the employer. Contractors who fail to notify VCU of increases in the number of employees that change their workers' compensation requirements under the *Code of Virginia* during the course of the Contract shall be in noncompliance with the Contract.
2. Employers Liability - \$100,000.
3. Commercial General Liability - \$1,000,000 per occurrence. Commercial General Liability is to include bodily injury and property damage, personal injury and advertising injury, products and completed operations coverage. VCU must be named as an additional insured and so endorsed on the policy.
4. Automobile Liability - \$1,000,000 per occurrence. (Only used if motor vehicle is to be used in the contract.)

S. **ANNOUNCEMENT OF AWARD:** Upon the award or the announcement of the decision to award a contract as a result of this RFP, VCU will publicly post such notice electronically at <http://www.eva.virginia.gov> for a minimum of ten (10) days.

T. **DRUG-FREE WORKPLACE:** During the performance of this Contract, the Contractor agrees to (i) provide a drug-free workplace for the Contractor's employees; (ii) post in conspicuous places, available to employees and applicants for employment, a statement notifying employees that the unlawful manufacture, sale, distribution, dispensation, possession, or use of a controlled substance or marijuana is prohibited in the contractor's workplace and specifying the actions that will be taken against employees for violation of such prohibition; (iii) state in all solicitations or advertisements for employees placed by or on behalf of the Contractor that the Contractor maintains a drug-free workplace: and

(iv) include the provisions of the foregoing clauses in every Subcontract or purchase order of over \$10,000, so that the provisions will be binding upon each Subcontractor and/ or Vendor.

For the purposes of this section, "drug-free workplace" means a site for the performance of work done in connection with a specific Contract awarded to a Contractor, the employees of whom are prohibited from engaging in the unlawful manufacture, sale,

distribution, dispensation, possession or use of any controlled substance or marijuana during the performance of the Contract.

**U. NONDISCRIMINATION OF CONTRACTORS:** A Bidder, Offeror, or Contractor shall not be discriminated against in the solicitation or award of this Contract because of race, religion, color, sex, national origin, age, disability, or against faith-based organizations or any other basis prohibited by state law relating to discrimination in employment. If the award of this Contract is made to a faith-based organization and an individual, who applies for or receives goods, services, or disbursements provided pursuant to this Contract objects to the religious character of the faith-based organization from which the individual receives or would receive the goods, services, or disbursements, the public body shall offer the individual, within a reasonable period of time after the date of his objection, access to equivalent goods, services, or disbursements from an alternative provider.

**V. eVA BUSINESS-TO-GOVERNMENT VENDOR REGISTRATION, CONTRACTS, AND ORDERS:** The eVA

Internet electronic procurement solution, website portal [www.eVA.virginia.gov](http://www.eVA.virginia.gov), streamlines and automates government purchasing activities in VCU. The eVA portal is the gateway for vendors to conduct business with VCU Institution and other public bodies. All Vendors desiring to provide goods and/or services to VCU shall participate in the eVA Internet e-procurement solution by completing the free eVA Vendor Registration.

Vendor Transaction Fees are determined by the date the original purchase order is issued and are as follows:

1. For orders issued July 1, 2014 and after, the Vendor Transaction Fee is:
  - a) DSBSD-certified Small Businesses: 1%, capped at \$500 per order.
  - b) Businesses that are not DSBSD-certified Small Businesses: 1%, capped at \$1,500 per order.
2. For orders issued July 1, 2014 the vendor transaction fees can be found at [www.eVA.virginia.gov](http://www.eVA.virginia.gov)

The specified vendor transaction fee will be invoiced, by the Commonwealth of Virginia Department of General Services, approximately thirty (30) days after the corresponding purchase order is issued and payable thirty (30) days after the invoice date. Any adjustments (increases/decreases) will be handled through purchase order changes.

**I. SPECIAL TERMS AND CONDITIONS:**

**A. ADVERTISING:** In the event a contract is awarded for supplies, equipment, or services resulting from this proposal, no indication of such sales or services to Virginia Commonwealth University will be used in product literature or advertising. The Contractor shall not state in any of the advertising or product literature that the Commonwealth of Virginia or any agency or institution of the Commonwealth has purchased or uses its products or services.

- B. **ADDITIONAL USERS OF CONTRACT:** It is the University's intent to provide other Virginia Association of State College and University Purchasing Professionals (VASCUPP) with access to the University's Agreements and to provide Contractors with opportunities to do business with other VASCUPP institutions of higher education. To that end and if agreeable with the Contractor, the following Colleges and Universities listed are the VASCUPP institutions and may have access to any agreement resulting from this solicitation: College of William and Mary, University of Virginia, George Mason University, Virginia Military Institute, James Madison University, Old Dominion University, Virginia Polytechnic Institute & State University and Radford University. Upon written request from a VASCUPP institution, the Contractor may allow access to the Contract. Although the University desires to provide access on such contract to VASCUPP, the Contractor is not required to provide such access. A firm's willingness to provide this access to VASCUPP members will not be a consideration in awarding this contract. Although the VASCUPP Agencies may have access to any resulting Agreement, VASCUPP is not bound to use the Agreement and any use of the Agreement is strictly optional. If the VASCUPP institutions choose to access the Agreement and the Contractor agrees to such access, the terms and conditions of the Agreement will be in full force and effect as between the VASCUPP institutions and the Contractor. VCU will have no responsibility for the resolution of any contractual disputes, or for payment for services rendered which may arise from a VASCUPP institution accessing the Agreement. The Contractor understands and agrees that it shall not have any recourse against VCU with respect to any claim it may have against another VASCUPP institution that accessed this Agreement.
- C. **AUDIT:** The Contractor shall retain all books, records, and other documents relative to this contract for five (5) years after final payment, or until audited by the Commonwealth of Virginia, whichever is sooner. The agency, its authorized agents, and/or State auditors shall have full access to and the right to examine any of said materials during said period.
- D. **AVAILABILITY OF FUNDS:** It is understood and agreed between the parties herein that the agency shall be bound hereunder only to the extent of the funds available or which may hereafter become available for the purpose of this agreement.
- E. **AWARD OF CONTRACT:**
1. Proposals will be evaluated based upon the information provided in the Offeror's Proposal using the criteria specified below and selection shall be made of two or more Offerors deemed to be fully qualified and best suited among those submitting proposals on the basis of the evaluation factors included in the Request for Proposal, including price, if so stated in the Request for Proposals. Negotiations shall be conducted with Offerors so selected. Price shall be considered, but need not be the sole determining factor. After negotiations have been conducted with each Offeror so selected, the agency shall select the Offeror which, in its opinion, has made the best proposal, and shall award the contract to that Offeror. The Commonwealth reserves the right to make multiple awards as a result of this solicitation. The Commonwealth may cancel this Request for Proposals or reject proposals at any time prior to an award, and is not required to furnish a statement of the reason why a particular proposal was not deemed to be the most advantageous. (*Governing Rules Section 49-D*). Should the Commonwealth determine in writing and in its sole discretion that only one Offeror is fully qualified, or that one Offeror is

clearly more highly qualified than the others under consideration, a contract may be negotiated and awarded to that Offeror. The award document will be a contract incorporating by reference all the requirements, terms and conditions of the solicitation and the Contractor's proposal as negotiated.

Notice of Award(s) or Notice of Intent to Award may be accessed electronically at <http://www.eva.virginia.gov> for a minimum of 10 days.

- F. **BEST AND FINAL OFFER (BAFO):** At the conclusion of negotiations, the Offeror(s) may be asked to submit in writing, a best and final offer (BAFO). After the BAFO is submitted, no further negotiations shall be conducted with the Offeror(s). The Offeror(s) proposal will be re-evaluated to combine and include the information contained in the BAFO. The decision to award will be based on the final evaluation including the BAFO.
- G. **PROPOSAL ACCEPTANCE PERIOD:** Any proposal in response to this solicitation shall be valid for ninety (90) days. At the end of the ninety (90) days, the proposal may be withdrawn at the written request of the Offeror. If the proposal is not withdrawn at that time it remains in effect until an award is made or the solicitation is cancelled.
- H. **PROPOSAL PRICES:** Proposal prices shall be in the form of a firm unit price for each item during the contract period
- I. **CANCELLATION OF CONTRACT:** The purchasing agency reserves the right to cancel and terminate any resulting contract, in part or in whole, without penalty, upon sixty (60) days written notice to the Contractor. In the event the initial contract period is for more than twelve (12) months, the resulting contract may be terminated by either party, without penalty, after the initial twelve (12) months of the contract period upon 60 days written notice to the other party. Any contract cancellation notice shall not relieve the Contractor of the obligation to deliver and/or perform on all outstanding orders issued prior to the effective date of cancellation.
- J. **CONTRACTOR LICENSE REQUIREMENT:** By my signature on this solicitation, I certify that this firm/individual and subcontractor is properly licensed for providing the goods/services specified.

Contractor Name: Jones Lang LaSalle Americas, Inc.

Subcontractor Name: Business Interiors & Moving Services, LLC

License#: 0026004176

Type: Real Estate Firm License

- K. **DRUG FREE WORKPLACE:** The Contractor acknowledges and certifies that it understands that the following acts by the Contractor, its employees and/or agents performing services on state property are prohibited:
1. The unlawful manufacture, distribution, dispensing, possession or use of alcohol or other drugs; and
  2. Any impairment or incapacitation from the use of alcohol or other drugs (except the use of drugs for legitimate medical purposes).
  3. The Contractor further acknowledges and certifies that it understands that a violation of these prohibitions constitutes a breach of contract and may result in default action being taken by the Commonwealth in addition to any criminal penalties that may result from such conduct.

L. **ELECTRONIC DATA INTERCHANGE:** University Purchasing has a great interest in utilizing Electronic Data Interchange (EDI) to improve efficiency of operation in the transmission of purchasing related information. Contractors are encouraged to provide a statement indicating their current EDI capabilities and/or future plans to establish/improve their EDI capabilities.

M. **EXTRA CHARGES NOT ALLOWED:** The proposal price shall be for complete services ready for Commonwealth's use, and shall include all applicable freight and installation charges; extra charges will not be allowed.

N. **GOVERNANCE:** The terms and conditions govern the contract and not any Contractor terms and conditions or services agreement.

O. **GRAMM-LEACH-BLILEY ACT:**

The Contractor shall comply with the Act by implementing and maintaining appropriate safeguards to protect and prevent unauthorized release of student, faculty and staff nonpublic information. Nonpublic information is defined as social security numbers, or financial transactions, bank, credit and tax information.

P. **IDENTIFICATION OF PROPOSAL:** The proposal package should be identified as follows:

<u>From: Jones Lang LaSalle Americas ,Inc.</u>	<u>09/29/2017</u>	<u>3:00PM</u>
<u>Name of Offeror</u>	<u>Due Date</u>	<u>Time</u>
<u>1801 K Street NW Ste 1000</u>	<u>7608269JK</u>	
<u>Street or Box Number</u>	<u>RFP No.</u>	
<u>Washington ,DC 20003-9998</u>	<u>Relocation Management Services</u>	
<u>City, State, Zip Code +4</u>	<u>RFP Title</u>	

Name of Contract Service Manager: John Kostyniuk, Construction Procurement Manager

The package should be addressed as directed on Page 2 of the solicitation. If a proposal is not clearly identified, the Offeror takes the risk that the proposal may be inadvertently opened and the information compromised which may cause the proposal to be disqualified. Proposals may be hand delivered to the designated location in the office issuing the solicitation. No other correspondence or other proposals should be placed in the envelope.

**LATE PROPOSALS:** To be considered for selection, proposals must be received by the issuing office by the designated date and hour. The official time used in the receipt of proposals is that time on the automatic time stamp machine in the issuing office. Proposals received in the issuing office after the date and hour designated are automatically disqualified and will not be considered. The University is not responsible for delays in the delivery of mail by the U.S. Postal Service, private couriers, or the intrauniversity mail system. It is the sole responsibility of the Offeror to insure that its proposal reaches the issuing office by the designated date and hour.

- Q. Q.INDEMNIFICATION: Contractor agrees to indemnify, defend and hold harmless the Commonwealth of Virginia, its officers, agents, and employees from any third party claims, damages and actions of any kind or nature, whether at law or in equity, arising ~~from or caused by the use of any materials, goods, or equipment of any kind or nature furnished by the Contractor/any services of any kind or nature furnished by the Contractor,~~ from the Contractor's negligence or willful misconduct under the Contract, provided that such liability is not attributable to the sole negligence of the using agency or to failure of the using agency to use the materials, goods, or equipment in the manner already and permanently described by the Contractor on the materials, goods, or equipment delivered.
- R. INSPECTION OF JOB SITE: My signature on this solicitation constitutes certification that I have inspected the job site and am aware of the conditions under which the work must be accomplished. Claims, as a result of failure to inspect the job site, will not be considered by the Commonwealth.

S. **REFERENCES:** Offerors shall provide a list of at least 3 references where similar goods and/or services have been provided. Each reference shall include the name of the organization, the complete mailing address, the name of the contact person and telephone number.

<u>ORGANIZATION</u>	<u>ADDRESS</u>	<u>CONTACT PERSON</u>	<u>TELEPHONE</u>
1. Harvard University	60 John F. Kennedy Street Cambridge, MA 02138	John F. Hollister	617-998-5530
2. College of William and Mary	Williamsburg VA	Kathy L.Mabe	757-221-1636
3. National Cancer Institute	37 Convent Drive Bethesda, MD 20892	Yolanda Koh	240-276-5030

- T. **SUBCONTRACTS**: No portion of the work shall be subcontracted without prior written consent of the purchasing agency. In the event that the Contractor desires to subcontract some part of the work specified herein, the Contractor shall furnish the purchasing agency the names, qualifications and experience of their proposed subcontractors. The Contractor shall, however, remain fully liable and responsible for the work to be done by its subcontractor(s) and shall assure compliance with all requirements of the contract.
- U. **U.WARRANTY (COMMERCIAL)**: ~~The Contractor agrees that the supplies or services furnished under any award resulting from this solicitation shall be covered by the most favorable commercial warranties the Contractor gives any customer for such supplies or services and that the rights and remedies provided therein are in addition to and do not limit those available to the Commonwealth by any other clause of this solicitation. A copy of this warranty must be furnished with the proposal.~~ Contractor does not have a formal service warranty but warrants that services will be performed in a good and workmanlike manner, consistent with customary business practices provided to its most favorable commercial customers.
- V. **WORK SITE DAMAGES**: Any damage to existing utilities, equipment or finished surfaces resulting from the performance of this contract shall be repaired to the Commonwealth's satisfaction at the Contractor's expense.
- W. **DAMAGE TO PUBLIC OR PRIVATE PROPERTY**: Under this contract, the Contractor shall be responsible for making repairs, as necessary, to public or private property damaged by their work at the Contractor's sole expense. Pavement, curbs or sidewalk repairs shall be as specified by the City of Richmond VA, Department of Public Works for each separate location at which time such repairs may be required as a result of the contractor's operations under the Contract **CONVENIENCE TO GENERAL PUBLIC AND PROPERTY OWNERS**: All work covered under this Contract shall be done in such a manner as to cause as little inconvenience as possible to the general public and property owners. All equipment and resulting material shall be placed along the route of the work so as not to inconvenience vehicular and pedestrian traffic. The Contractor shall provide adequate means to safely direct traffic past the point of construction and all other points that are affected by the work at all times. No closures shall be allowed unless specifically coordinated and approved. Access to property shall be maintained, and any time where there is a loss of access, the Contractor shall coordinate with VCU Department of Physical Plant. No payment will be made for the maintenance of traffic.
- X. **POLICY OF EQUAL EMPLOYMENT**: Virginia Commonwealth University is an equal opportunity/affirmative action employer. Women, Minorities, persons with disabilities are encouraged to apply. The University encourages all vendors to establish and maintain a policy to insure equal opportunity employment. To that end, Offerors should submit along with their proposals, their policy of equal employment.
- Y. **COMMUNICATIONS**: Communications regarding this Request for Proposals (RFP) shall be formal from the date of issue for this RFP, until either a Contractor has been selected or the University Purchasing Department rejects all proposals. Formal communications shall be directed to the University Purchasing Department.



Informal communications including but not limited to, request for information, comments or speculations, regarding this RFP to any University employee other than a Purchasing Department representative may result in the offending Offeror's proposal being rejected.

**AA. eVA BUSINESS-TO-GOVERNMENT CONTRACTS AND ORDERS:** The solicitation/contract will result in purchase order(s) with the eVA transaction fee specified below assessed for each order.

1. For orders issued July 1, 2011 thru June 30, 2013, the Vendor Transaction Fee is:
  1. DSBSD-certified Small Businesses: 0.75%, Capped at \$500 per order.
  2. Businesses that are not DSBSD-certified Small Businesses: 0.75%, Capped at \$1,500 per order.
2. For orders issued July 1, 2013, and after, the Vendor Transaction Fee is:
  1. DSBSD-certified Small Businesses: 1%, Capped at \$500 per order.
  2. Businesses that are not DSBSD-certified Small Businesses: 1%, Capped at \$1,500 per order.

The specified vendor transaction fee will be invoiced, by the Commonwealth of Virginia Department of General Services, approximately 30 days after the corresponding purchase order is issued and payable 30 days after the invoice date. Any adjustments (increases/decreases) will be handled through purchase order changes.

The eVA Internet electronic procurement solution, website portal [www.eva.virginia.gov](http://www.eva.virginia.gov), streamlines and automates government purchasing activities in the Commonwealth. The portal is the gateway for vendors to conduct business with state agencies and public bodies.

Vendors desiring to provide goods and/or services to the Commonwealth shall participate in the eVA Internet e-procurement solution and agree to comply with the following: If this solicitation is for a term contract, may provide an electronic catalog (price list) or index page catalog for items awarded. The format of this electronic catalog shall conform to the eVA Catalog Interchange Format (CIF) Specification that can be accessed and downloaded from [www.eVA.virginia.gov](http://www.eVA.virginia.gov). Contractors should email Catalog or Index Page information to [eVA-catalog-manager@dgs.virginia.gov](mailto:eVA-catalog-manager@dgs.virginia.gov).

**BB. ELECTRONIC COPIES OF PROPOSALS:**

The successful Contractor may be required to provide the VCU Department of Procurement Services with a copy of the Contractor's entire original proposal (to include all attachments), and all subsequent correspondence (i.e. responses to requests for clarification and documents generated through the negotiation process) in an unsecured electronic format (i.e. email, disc - CD or DVD or flash drive). The Contractor SHALL NOT INCLUDE ANY PREVIOUSLY IDENTIFIED PROPRIETARY INFORMATION IN THE ELECTRONIC FORMAT; VCU will post the Contractor's original proposal, and all subsequent correspondence on the VCU Department of Procurement Services Website, VCU shall not be responsible for the Contractor's failure to exclude proprietary information submitted in the unsecured electronic format).

**CC. CONTRACT SUMMARY:**

The Contractor must provide to the University within fourteen (14) days after award of contract, an unsecured electronic summary of the contract. All the main features of the contract, including pricing, must be summarized. The contract summary will provide information for authorized users that choose to access the contract.

**DD. PROTEST:**

Any Offeror who desires to protest the award or decision to award a Contract shall submit the protest in writing to:

Director of Procurement Services Virginia Commonwealth  
University 912 West Grace, 5<sup>th</sup> Floor Richmond, VA 23284

VCU will announce the award utilizing the Commonwealth of Virginia's e-Procurement system (eVA). The protest must be received no later than ten (10) days after the award or the announcement of the decision to award, whichever occurs first. However, if the protest of any actual or potential Offeror depends in whole or in part upon information contained in public records pertaining to the procurement transaction that are subject to inspection under the Rules Governing Procurement of Goods, Services, Insurance, and Construction by a Public Institution of Higher Education of the Commonwealth of Virginia Governed by Subchapter 3 of the

## Appendix A: Signature Page

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Restricted Higher Education Financial and Administrative Operations Act,, Chapter 4.10 (§23-38.88 et seq) of Title 23 of the Code of Virginia, §34, then the time within which the protest shall be submitted shall expire ten (10) days after those records are available for inspection by such Offeror under §34, or at such later time as provided in this section.

VCU Notices of Award(s) or Notices of Intent to Award may be accessed electronically at <http://www.eva.virginia.gov>.

No protest shall lie for a claim that the selected Offeror is not a responsible Offeror. The written protest shall include the basis for the protest and relief sought.

The VCU Director of Procurement Services shall issue a decision in writing within ten (10) days of receipt stating the reasons for the action taken. This decision shall be final unless the Offeror appeals within ten (10) days of receipt of the written decision by instituting legal action as provided in Section 54 of the Governing Rules.

Nothing in this clause shall be construed to permit a proposer to challenge the validity of the terms or conditions of the RFP. "Days" as used in this paragraph refer to calendar days. If a deadline falls on a Saturday or Sunday, the next business day shall be considered to be the deadline.

### Signature Page

#### Request for Proposals RFP #7608269JK

**Issue Date:** 8/18/2017

**Title:** Relocation Management Services

**Send all Proposals To:** Virginia Commonwealth University  
RFP # 7608269JK  
Attention: John Kostyniuk  
912 W Grace St, 5th floor  
Richmond, Virginia 23284-0327

**Proposals Shall Be Received Until:** 9/29/2017 at 3:00 PM.

**Direct ALL inquiries concerning this RFP to:** John Kostyniuk, Procurement Manager  
(Construction, A and E, and Facilities) [kostyniukjs@vcu.edu](mailto:kostyniukjs@vcu.edu)


**Questions concerning this RFP must be received via email no later than:** 9/20/2017 @ 3:00PM

HARD-COPY, ORIGINAL PROPOSALS MUST BE RECEIVED IN VIRGINIA COMMONWEALTH UNIVERSITY'S DEPARTMENT OF PROCUREMENT SERVICES ON OR BEFORE THE DATE AND TIME DESIGNATED ON THIS SOLICITATION. ELECTRONIC SUBMISSIONS AND FACSIMILE SUBMISSIONS WILL NOT BE ACCEPTED IN LIEU OF THE HARD-COPY, ORIGINAL PROPOSAL. VENDORS ARE RESPONSIBLE FOR THE DELIVERY OF THEIR PROPOSAL. PROPOSALS RECEIVED AFTER THE OFFICIAL DATE AND TIME WILL BE REJECTED. THE OFFICIAL DATE AND TIME USED IN RECEIPT OF RESPONSES IS THAT TIME ON THE CLOCK OR AUTOMATIC TIME STAMP IN THE DEPARTMENT OF PROCUREMENT SERVICES.

**IF PROPOSALS ARE HAND DELIVERED OR SENT BY FEDEX, UPS, OR ANY OTHER PRIVATE COURIER, DELIVER TO THE ADDRESS NOTED ABOVE: VIRGINIA COMMONWEALTH UNIVERSITY, RFP # 7635588JK, ATTENTION: John Kostyniuk, 912 W.**

This Request for Proposals & any Addenda are posted on the eVA website at: <http://www.eva.virginia.gov>

In Compliance With This Request for Proposals And To All Conditions Imposed Therein and Hereby Incorporated By Reference, The Undersigned Offers And Agrees To Furnish The Goods/Services Described Herein In Accordance With The Attached Signed Proposal Or As Mutually Agreed Upon By Subsequent Negotiation. Furthermore, The Undersigned Agrees Not To Start Any Work Relative To This Particular Solicitation Until A Resulting Formal Signed Purchase Order Is Received By The Contractor From University's Department of Procurement Services. Any Work Relative To This Request for Proposals Performed By The Contractor Prior To Receiving A Formal Signed Purchase Order Shall Be At The Contractor's Own Risk And Shall Not Be Subject To Reimbursement By The University. **Signature below constitutes acknowledgement of all information contained through links referenced herein.**

<p><b>NAME AND ADDRESS OF COMPANY:</b> Jones Lang LaSalle Americas, Inc.  <b>Address:</b> 1801 K Street NW, Suite1000  <b>Zip Code:</b> 20006  <b>E-Mail Address:</b> <a href="mailto:Ilana.Breslaw@am.jll.com">Ilana.Breslaw@am.jll.com</a>  <b>Telephone:</b> 301-399-8050  <b>Toll free, if available:</b> N/A  <b>DUNS NO.:</b> 933709685  <b>REGISTERED WITH eVA:</b> No  <b>VIRGINIA DSBSD:</b> No  <b>DSBSD CERTIFICATION #:</b> Not Applicable</p>	<p><b>Date:</b> September 19, 2017  <b>By (Signature In Ink):</b>   <b>Name Typed:</b> Ilana Breslaw  <b>Title:</b> VP   RPM Sr. Team Lead                  JLL, PDS RPM Services  <b>Fax Number:</b> None  <b>FEI/FIN NO.:</b> Not Applicable  <b>SMALL BUSINESS:</b> No  <b>MINORITY-OWNED:</b> No  <b>WOMEN-OWNED:</b> No</p>
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## Appendix B: Acknowledgment of Addenda

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RFP-Addendum

DATE: 9/22/2017

ADDENDUM NUMBER ONE (1), TO ALL OFFERORS

Reference-Request for Proposal: RFP# 7608269JK

Commodity/Title: Relocation Management Services

Issue Date: 9/5/2017

Proposal Due: 9/29/2017

Pre-Proposal Conference: Was held on 9/14/2017

The addenda includes the questions and answers along with the updated pricing attachment in eVA: See attached "Questions and Answers" and the pricing excel document in eVA title "Attachment A-Pricing"

NOTE: A signed acknowledgment of this addendum must be received by this office either prior to the proposal due date or attached to your proposal. Signature of this addendum does not constitute your signature on the original proposal document. The original proposal document must also be signed.

Very truly yours,  
John Kostyniuk  
804.828.5954

Name of Firm: Jones Lang LaSalle Americas, Inc.

Signature/Title:  VP | RPM Sr. Team Lead;  
JLL, PDS|RPM Services

Date: September 28, 2017

## Appendix C: Resumes

### Resumes



#### Kevin Wall

Program Manager  
Relocation Project Management, PDS

#### Current responsibilities

Kevin Wall is an Account Lead for JLL's Relocation Project Management platform. He provides strategic leadership and guidance for assigned client accounts. He directs a team of professionals in providing project management, space planning, move/add/change, work order administration, CAD/CAFM (IWMS) services, asset management, operational and financial reporting, and/or other corporate real estate services and support. Kevin is also the senior client contact, helping ensure JLL's service delivery and objectives are aligned with the client's real estate and business objectives.

#### Current project responsibilities

**Defense Intelligence Agency:** Account Lead providing management oversight of a five year, \$39M BPA for comprehensive furniture services: delivery, installation, disposal and acquisition. Services include assessing customer's furniture needs, comprehensive proposal creation and submission, on-site office design support, procurement, delivery and installation logistics. Leads the eight person on-site team that provides timely, comprehensive, and cost effective services resulting in a turn-key operation for the furniture program. The team's service delivery minimizes disruption to the workforce during all furniture acquisition and transaction activities. This successfully administered program provides DIA a centralized, customer focused entity for all office furniture procurement.

#### Project experience

**Washington Headquarters Services, Washington, DC:** Transition Executive provided project management, coordination and integration services to the WHS Base Realignment and Closure Program Office (WHS BPO). WHS BPO oversaw the design and construction of 1.7M SF of new administrative space at the Mark Center and the subsequent relocation of 6,409 personnel from various leased office spaces around the National Capitol Region to the new site. Directed the assembled team in the coordination of the Client Requirements Management Program through the

#### Client experience

Defense Intelligence Agency  
U.S. Department of Defense, WHS  
Virginia Polytechnic Institute and State University  
Food and Drug Administration  
Corning, Inc.  
Schreiber Foods Inc.

#### Affiliations

Member, Marine Corps Association  
Military Officers Association of America

#### Certifications

OSHA 10

space planning and design effort; relocation planning and management; and the integration of all transition activities. Led the cross functional and integrated planning team approach to accommodate a total of 133 tenant design meetings, for 24 different tenant organizations, over an eight-month period. Responsible for the management, oversight, and development of the move sequence, cost estimate, contractor scope of work, and the tenant move guide.

**Virginia Polytechnic Institute and State University (Virginia Tech):** Principal and Area Manger over a team that supported the occupancy of Goodwin Hall, the new four-story flagship building for the College of Engineering. This state of the art facility houses 40 instructional and research labs, 8 classrooms, an auditorium, and 150 office spaces for several engineering departments. Managed a team in completion off relocation assessment, project schedule and budget deliverables. Based on the initial assessment, managed the team to implement the Relocation and Occupancy Plan, involving all of the supporting departments in gathering crucial input into the final integrated relocation schedule. Relocation was implemented during a five-week period at the end of the spring semester, well in advance of the scheduled start in the fall.

**Food and Drug Administration, White Oaks, MD:** Principal and Area Manager responsible for the development and programming for the final phase transitioning of laboratory and administrative operations and 2,500 staff from 11 existing facilities in Rockville/Bethesda, MD to the new 3.9 M SF White Oak Campus. Led a transition team that implemented a full scope of work including the development and maintenance of the master relocation plan and schedule. The team coordinated the relocation of unique testing laboratories from multiple sites into two new state of the art facilities.

**Corning Inc., Corning, NY:** Transition Executive on a team that provided a broad spectrum of services including the development and execution of a relocation plan; coordination and turnover of \$300M facility to Corning Facilities and Operations; occupancy schedule development and management; relocation budget validation and management; vendor procurement coordination; and asset inventory and tracking. Services provided included IT coordination, communications development and publication, pre-move preparation, on-site move supervision, post-move furniture/equipment decommissioning coordination.

**Schreiber Foods Inc. Project; Green Bay, WI:** Transition Executive for the Schreiber Foods Headquarters Consolidation, Relocation, and Decommissioning Project; planned, coordinated, and managed the transition to a new 260,000 SF headquarters facility. The new headquarters consolidated all operations and 700 employees from six leased locations into a new, state-of-the-art building designed to support cross-functional team collaboration. The detailed planning accommodated a 20,000 SF lab and a 40,000 SF pilot production plant in addition to a test kitchen, machine shop, packaging lab, and data center as well as executive and administrative offices. Led the multi-phase process beginning with an assessment of transition planning requirements, responsibilities, and creation of a master timeline following with detailed planning of the move

sequence, end user communications, and move implementation. Handled the procurement of all third party move vendors in coordination with the client's purchasing department.

**Education and affiliations**

Kevin has a master's degree in public administration and bachelor's degree from Villanova University. He also has DOD Security Clearance and is OSHA 10 certified.



**Courtney M. Mains**  
Senior Move Manager  
Relocation Project Management, PDS

**Current responsibilities**

As a Senior Move Manager for JLL's Relocation Project Management (RPM) platform, Courtney provides expertise in project management, transition planning and management, space planning, work order administration, CAD/CAFM administration and asset management. His experience also includes FF&E installation coordination with vendors and consultants during major moves. Courtney provides a wealth of industry experience, enabling him to effectively lead and manage a project team to a successful end result.

**Project experience**

**Virginia Commonwealth University**

- Courtney served as the local move coordination representative for laboratory and administrative relocation planning and management for a former department chair and his 10 staff members. Project responsibilities included coordination with the general mover, as well as refrigerated transportation and chemical packing/transportation vendors.

**College of William & Mary**

- As Senior Move Manager, Courtney was responsible for the implementation of the Integrated Science Center (ISC) Phase III occupancy project. He managed relocation of the Biology, Applied Science, Chemistry and High Performance Computing departments as well as the W&M Greenhouse. Other services focused on the procurement of FF&E for the newly constructed ISC as well as the various vendor services associated with the FF&E deliveries and installation.

**Department of Defense Washington Headquarters Services**

- BRAC (Base Realignment and Closure) 133 – the congressionally authorized process by which the DOD periodically reorganizes its military base structure – mandated the move of many DoD offices from leased office space to secure sites. Courtney was part of the assembled team that coordinated the Client Requirements Management Program through the

**Client Experience**

- College of William & Mary
- National Institutes of Health
- U.S. Department of Defense Washington Headquarters Services
- Virginia Commonwealth University

**Certifications**

- AutoCAD
- OSHA 10
- LEAN
- Agile/Scrum
- Currently pursuing PMP certification
- Member, Project Management Institute

space planning and design effort; relocation planning and management; and the integration of all transition activities. The team developed and refined the tenant transition plan, maintained a direct link to tenants and the U.S. Army Corps of Engineers (USACE), and analyzed space and design requirements for the Mark Center, a 1.1 million square foot secured facility. Courtney facilitated the cross functional and integrated planning team approach to accommodate a total of 133 tenant design meetings for 24 different tenant organizations over an eight-month period. He also assisted in the management, oversight, and development of the move sequence, cost estimate, contractor scope of work, and the tenant move guide. Courtney supported 13 of the 24 tenant agencies in move planning and execution from 36 locations.

### **Prior experience**

#### **National Institutes of Health**

- While with a previous employer, Courtney was responsible for activation of 26 different laboratory and office renovations, including management of all furniture and equipment procurement, installation and certification. Project included relocation of 800 personnel into approximately 500,000 square feet of clinical research space. Courtney was instrumental in the activation of Clinical Research Center vivarium space, construction coordination, and building maintenance.

#### **Education and Affiliations**

Courtney has a bachelor's degree from Virginia Polytechnic Institute.





**Alycia Martini**

Move Manager, Space Planner  
Relocation Project Management, PDS

**Current responsibilities**

Alycia Martini is an Interior Designer; with more than 11 years of experience in the relocation industry. Her primary role is to utilize knowledge in the development of furniture space plans, typicals and reassignment of reuse furniture. She develops and implements an organization's relocation strategy, furniture implementation and small projects. As member of the RPM team she participates in the definition of project scope and deliverables. Capable of successfully planning and managing moves of all sizes. Acts as a single point of contact for all move related activities.

**Previous experience**

**Duke Ellington School of the Arts, Washington DC; Move Coordinator**

- Interacted with faculty and staff to assist with the implementation of departmental relocation strategy and requirements while adhering to tight academic calendar restrictions. Coordinated schedule with various services and move contractors. Visited off site warehouse to confirm existing storage items and suggested items for disposal.
- Distributed move packets that includes packing instructions and color coded move labels. Acted as a point of contact for move-related issues. Participates in client meetings and provided detailed meeting minutes for disbursement. Installed move signage and was present during moves to provide guidance.

**California State University, Monterrey Bay; Interior Designer,**

- Specializing in generating construction documents, space planning, creating marketing boards, and specification of furniture, fixtures, & equipment (FF&E)
- Served as an expert in space planning and the Lead Project Manager for the relocation of an entire department into a new swing space. Approved the purchase, design, and installation of the office space. Revised AutoCAD files and assisted with GIS creation of site plans. Enforced institutional guidelines, processes, and safety codes.
- Oversaw the relocation of furniture and equipment to new sites across campus through directing 10 on-site contractors. Directed the development and modification of new furniture purchasing contracts. Maintained and upgraded tools and equipment. Supervised five staff members within the furniture warehouse. Executed the graduation exit plans in 2014 and 2015.
- Created successful floor plans for the "Have a Heart" Benefit in 2014 and 2015.

**Federal Reserve Board of Governors in Washington DC.; Space Planning Analyst**

**Client experience**

- Duke Ellington School of the Arts
- U.S. Army Installation Management Command
- California State University- Monterrey Bay
- Federal Reserve Board of Governors
- BD Diagnostics
- Esposito Design

**Certifications**

- OSHA 10

- Collaborated with senior management, including the current Governor, to define the requirements for each project. Devised task orders and purchased requisitions for moving services through approved outside contractors. Managed the installations by directing 20 contractors during agency-wide moves. Established a new office space within GSA standards for the relocation of the Management Division. Conducted site surveys, recreated site dimensions, and approved the site for the project.
- Purchased furniture and maintained inventory. Developed a historical furniture inventory with coding and locations within the assigned warehouse. Member of the review team for a new warehouse and law enforcement training center.
- Designed new office layout for a governor with furniture block plans, finish palettes, and installation drawings.

#### **Becton Dickenson; Space Planner & Move Coordinator**

- Monitored, and oversaw all related moves and occupancy planning
- Produced graphic charts and diagrams for visual display of quantitative and qualitative information. Generated conceptual solutions for the spatial requirements, physical planning constraints, and corresponding IT, HR and compliance requirements. Evaluated alternative scenarios against criteria for success. Established project goals and objectives, including scheduling and budget parameters.
- Directed a crew of 10 outside contractors as the move team leader. Identified, procured, and received furniture and work orders. Reviewed vendor contracts, onsite vendor performance, timely work-order completion, and construction related activities.
- Illustrated organizational, operational, and functional relationships that posed physical and spatial impacts for clients, support staff, and senior management. Generated strategic traffic egress site plans.

#### **Education and affiliations**

Alycia has an Interior Design degree from Fordham University, in Bronx, NY. She is currently seeking her Master's Certification in Environmental Planning from American Public University.



## Cathy Trocchia

Move Manager, Space Planner  
Relocation Project Management, PDS

### Current responsibilities

As a Move Manager and Space Planner for JLL's Relocation Project Management (RPM) platform, Cathy Trocchia specializes in interior design, relocation management, furniture management and developing complex solutions for planning and design review. She provides expertise in project management, space planning, CAD administration, asset management, furniture procurement management and installation and move services. Cathy has a wealth of industry experience, enabling her to effectively lead and manage a project team to a successful end result.

### Project experience

#### The MITRE Corporation

- For this not-for-profit company that operates multiple federally funded research and development centers (FFRDCs), Cathy led a team to manage a multi-phase, multi-group, multi-facility relocation project to a new facility on their McLean, VA campus. She also managed a consolidation project from multiple owned and leased facilities to a single building.
- Project phases included relocating 1,600 employees, 20 labs and five buildings totally approximately 800,000 square feet.

#### The George Washington University

- For the Science and Engineering Hall (SEH) Relocation Services project, Cathy provided comprehensive relocation and furniture services for the new 507,000 square foot building. Project deliverables included CAD space planning and office layout support, new and reuse furniture planning, furniture inventory and vendor coordination.
- For the Science and Engineering Hall (SEH) Inventory Services project, Cathy provided inventory and assessment of lab equipment. She created and maintained the project schedule, validated inventory and analyzed floor plans to confirm equipment determination by location. With approximately 218,000 square feet of lab space, the SEH holds 117 researchers and 19 teaching labs.

#### Gallaudet University

- Cathy provided move management support for campus moves, furniture inventory and reuse support, and assisted with relocation planning.

#### Federal Deposit Insurance Corporation (FDIC)

### Client Experience

Alcoa, Inc.  
Defense Healthcare  
HQ  
Federal Deposit  
Insurance  
Corporation  
Gallaudet University  
George Washington  
University

### Certifications

OSHA 10

- Cathy supported the project team for relocation and realignment of more than 470 staff in Virginia Square, and 1,480 staff in Washington, DC. She was responsible for planning and managing the six-phase backfill of staff space from two locations.

#### **Old Post Office Pavilion Relocation Project (on behalf of GSA)**

- Cathy was lead Project Manager for the relocation of the National Endowment for the Arts, the National Endowment for the Humanities and the National Council on Historic Preservation as they vacated the Old Post Office Pavilion. Relocation included three phases and more than 500 staff. Project responsibilities included management of furniture disposition, move planning and scheduling, meeting management and welcome desk supervision.

#### **Alcoa, Inc.**

- Cathy managed the consolidation of 3,000 square feet in Washington, DC and 2,500 square feet in Crystal City, VA to one 5,500 square foot location in DC. Cathy directed relocation of 14 employees to the new space.

#### **Defense Healthcare Headquarters (DHHQ)**

- JLL was hired to manage DHHQs relocation contract valued at \$1.8 million. The contract was for full relocation services, furniture procurement of all new furniture including case goods (approximately \$40 million), systems and ancillary furniture and high density filing systems.
- Cathy assisted with procurement management for all systems, office and ancillary furniture for three buildings totaling 669,000 square feet. She also developed a way finding program which included issue of RFPs to vendors and supervision of signage installation through punch list resolution.

#### **Education and affiliations**

Cathy has a bachelor's degree in interior design from Marymount University.



**Bobby Canner**  
 Move Manager  
 Relocation Project Management, PDS

**Current responsibilities**

As a Move Manager for JLL’s Relocation Project Management (RPM) platform, Bobby Canner provides support for all aspects of project scope. He manages with client, vendor, contractor, and consultant meetings; and oversees and maintains project documentation, record maintenance, historical data, budgeting, and project files. Bobby helps ensure projects are completed as proposed, assisting with project close-out and transition and administering all phases of the project coordination process. He manages project details at the field level, keeping the project on track for success.

**Project experience**

**U.S. Bureau of Economic Analysis (BEA)**

- Bobby managed all aspects and scope of the Phase II relocation project for the BEA. This project involved 40 total moves, including swing and final moves of nearly 500 staff within BEA's headquarters in Suitland, MD. Additionally, Bobby managed the removal of old workstation furniture and the installation of new product in conjunction with the swing move schedule. As the project lead, Bobby managed the mover and other vendor subcontracts, including procurement, oversight, and invoicing.
- As part of JLL's subcontract to Allsteel, Bobby managed, including liaising with the client and other stakeholders, the resolution of punch items related to moveable partitions and office wall trim in BEA's space.

**The George Washington University**

- For the Science and Engineering Hall (SEH) relocation, Bobby assisted with a preliminary feasibility study and inventory of equipment, compiled equipment specification sheets for detailed equipment inventory, and conducted the physical inventory of laboratory equipment, creating a master inventory in preparation for the move.
- As part of the effort to finalize the move in to the Science and Engineering Hall, Bobby worked with specialty vendors to obtain quotes, finalize procurement, and service and relocate specialty laboratory equipment. Bobby also worked closely with principal investigators for each lab to determine their needs, coordinate all necessary requirements, and manage the relocation process

**U.S. Department of Health and Human Services (DHHS)**

**Client experience**

U.S. Bureau of Economic Analysis (BEA).

The George Washington University

U. S. Department of Health and Human Services (DHHS)

U.S. Mine Safety and Health Administration (MSHA)

McCormick & Company, Inc

U.S. Marshals Service (USMS)

U.S. Social Security Administration (SSA)

International Monetary Fund (IMF)

**Language skills**

- Fluent in French
- Conversational in Arabic

- As File Planning Lead, Bobby managed the mapping and migration of 10,000+ linear feet of files and assisted in the planning and implementation for an internal restack and 15-phase relocation project involving the consolidation of 3,500 staff from four outbound buildings.
- Bobby met with records liaisons and move coordinators, developed detailed mapping plans; supervised packing, migration, and unpacking processes, and coordinated the logistics of the transport of secure files where appropriate.
- As Project Manager for the Health Resources and Services Administration (HRSA), an agency within DHHS, Bobby conducted move coordinator meetings, drove project schedule, and managed all specific move requirements.

#### **U.S. Department of Health and Human Services (DHHS)**

- As File Planning Lead, Bobby managed the mapping and migration of 10,000+ linear feet of files and assisted in the planning and implementation for an internal restack and 15-phase relocation project involving the consolidation of 3,500 staff from four outbound buildings.
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- As Project Manager for the Health Resources and Services Administration (HRSA), an agency within DHHS, Bobby conducted move coordinator meetings, drove project schedule, and managed all specific move requirements.

#### **U.S. Mine Safety and Health Administration (MSHA)**

- Bobby assisted in the relocation of 350 staff, managed the procurement process for specialty equipment and services, including AV infrastructure and kitchen/pantry appliances, coordinated and supervised delivery and installation of specialty equipment, oversaw site verification walkthroughs, and managed overall project schedule.
- Bobby managed the RFP/SOW process, including assembly of requirements, price and specification comparison, document creation, and bidder selection recommendations.

#### **McCormick & Company, Inc.**

- Bobby managed all aspects of this project, including vendor procurement and management, IT and file planning and overall move planning and execution. He developed and implemented a complex relocation plan involving vacating and backfilling 240 positions in three buildings. Bobby also created a numbering convention to facilitate assignment of spaces, and maintained and updated floor plans during the planning phase.

#### **Education and affiliations**

Bobby has a bachelor's degree in applied linguistics from the University of Maryland, Baltimore County.



**Patrick Konecni**  
 Move Manager  
 Relocation Project Management, PDS

**Current responsibilities**

As a Move Manager for JLL's Relocation Management Project platform, Patrick supports project management activities. His knowledge includes strategic planning, space planning, file planning, furniture inventory and implementation, and move coordination.

**Previous experience**

- **Bureau of Economic Analysis** – Supported the project by providing on-site supervision and management of the move, IT and furniture vendors. Responsibilities included participation in weekly and bi-weekly status meetings, check-out, mover supervision, on-site inventory of personnel's crates, IT equipment, and furniture, post-move check-ins, management of the furniture delivery and installation, IT disconnect and reconnect, quality check walk-throughs and punch list management.
- **Duke Ellington School of the Arts** – Supported the project by providing on-site supervision and management of the relocation including mover supervision, post-move check-ins, daily quality walk-throughs, and post-move assistance.
- **U.S. Marshals Service** – Supported the project by providing on-site supervision and management including participation in check-out, the inventory and supervision of crate deliveries, distribution and collection, mover supervision, onsite inventory and fine tuning, management of post move helpdesk and punch list.
- **College of William & Mary** – Supported the relocation by placing room and equipment placards, organizing and handing out move packets/labels, performing pre-move checkouts and post-move check-ins and providing mover supervision.

**Previous experience**

- **Transportation Security Administration (TSA)** – Provided planning assistance to the Federal TSA staff and BCS contractor support teams charged with the consolidation of the 530,000 SF TSA HQ project.
- **National Protection & Programs Directorate (NPPD)** - Provided facilities management assistance for the day to day operations for both the building and the DHS staff.
- **National Aeronautical & Space Administration (NASA) Integrated Engineering Services Building (IESB)** – Provided relocation coordination assistance for the IESB at NASA Langley Research Center in Hampton, VA. The BCS team's tasks included transition planning for multiple specialty groups including a cafeteria and conference center, and relocation schedule development and maintenance. Assistance was provided to the NASA tenants before, during and after the move.

**Client experience**

- U.S. Bureau of Economic Analysis
- U.S. Marshals Service
- College of William & Mary
- Duke Ellington School of the Arts
- Transportation Security Administration
- National Aeronautical & Space Administration

**Certifications**

- OSHA 10



**Education and affiliations**

Patrick has a bachelor's degree in management from Hood College.



**Rebecca Ivins**

Project Manager  
Project Manager, PDS

**Current responsibilities**

Rebecca Ivins started working for JLL in January 2017 and is currently a Project Manager over the Adult Outpatient Facility (AOF) project for VCU Health System. The AOF is a \$349.2M ground up construction project currently in the design phase and set to officially begin in February 2018. In addition, Rebecca assists the growing RPM business line in the State of Virginia. With nearly ten years of healthcare experience, Rebecca has worked on both sides of interior construction – from management of demolition / renovation / and ground up construction to the management of moves, adds and changes.

**Previous experience**

Rebecca came out of a project management / business development background working more than five years for a sub-specialty contractor in the life science / healthcare / biotech industries. Prior to that, Rebecca worked as a Business Development Manager in human healthcare sales. She gained insight and experience through her tenure there and through previous employment engagements; thus stepping into her role at JLL carrying those experiences with her.

Below are a few of her previous roles:

- **New England Lab Inc.:** Virginia Director of Business Development and Project Manager / Move Manager
- **Trekport** (based in Australia): Director of Business Development and acting U.S. General Sales Manager, working directly with the U.S. FDA and Australian KFDA
- **LaBelle Inc.** (Modesto, California): Vice President of Human Health Services
- **Quick Service Restaurant:** Vice President of Sales for Inflatable Images, landing the company's largest sale to date with Deutsch Advertising and DreamWorks Inc.

**Education and affiliations**

Rebecca has a bachelor's degree in biology from the University of Akron. She also majored in communications at Ohio Center for Broadcasting – specializing in on-air communications.

**Client experience**

- Virginia Polytechnic Institute
- The College of William and Mary
- James Madison University
- George Mason University
- Virginia Commonwealth University
- Radford University of Virginia
- Eastern Virginia Medical School
- Sentara Hospital VCUHS

**Certifications**

- OSHA 10
- CICTI
- AutoCAD
- Member, Project Management Institute
- AFFA



## Appendix D: Sample Documents

### Sample documents

#### RACI chart sample

Below is an example RACI chart of responsibilities used with clients. For definitional purposes:

R = who is responsible

A = who is accountable

C = who is consulted

I = who is informed

Phase	Task/Sub Process	Client	Client vendor	JLL	JLL vendor	Move Coordinators
<b>Pre-Relocation</b>						
	Construction PM	A	R	I		
	Architect	A	R	I		
	New furniture	A	R	I		
	Furniture reuse	I		A	R	
	IT disconnect and reconnect	R		C		
	A/V installation	A	R	I		
<b>Initiate</b>						
	Project initiation and administration	I		R		
	Prepare for and conduct a project kick-off meeting	I		R		
<b>Plan</b>						
	Complete data collection and inventories			R		
	Finalize project plan					
	- Establish the communication plan	I	I	R	I	I
	- Develop and/or update the relocation schedule	I	I	R	I	I
	- Develop and/or update project budget and cost assumptions	I	I	R	I	I
	- Identify project risks and mitigations	I	I	R	I	I
	- Finalize the Quality Plan and oversight	I	I	R	I	I

	Conduct Project Team Meetings	C	I	R	I	
	Conduct move vendor RFP	C		R		
	Conduct specialty vendor RFP's	C		R		
	Conduct Move Coordinator Meetings	I		R		C
	Develop and manage the move matrix	I		R		C
	Conduct Quality Check-Ins	C		R		
	Coordinate the file planning and mapping process	I		R		C
	Coordinate any FF&E, IT, A/V or other vendors	C	I	A	R	I
<b>Move</b>						
	Conduct move logistics preparation			R		
	Develop and distribute staff communications	I		R		C
	Coordinate with building management			R		
	Develop and implement a cleanout campaign(s)	I		R		C
	Develop and distribute the move packet	I		R		C
	Provide on-site move supervision	I		A	R	
	Set-up and manage a post-move support center	I		A	R	C
	Provide an on-line post-move request system	I		R		I
	Coordinate surplus management - FF&E disposition	C		A	R	
<b>Close</b>						
	Conduct lessons learned meeting	C	C	R	C	C
	Update CAFM or provide data to CAFM admin	I		R		
	Conduct Client Satisfaction Survey	C		R		C
	Complete project close administration	I		R		