

**STATEMENT OF WORK
MOVING AND STORAGE SERVICES
INVITATION TO QUALIFY (ITQ) CONTRACT**

OVERVIEW: The purpose of the Moving and Storage Services ITQ statewide contract is to qualify responsible and responsive Contractors to perform moving services and to provide storage services related to moves, for Commonwealth of Pennsylvania agencies. In addition, Local Public Procurement Units, as defined by the Commonwealth Procurement Code, may use this contract in accordance with the COSTARS Provision contained in this document. **Only Certified Small Businesses are eligible for award. See additional language regarding eligibility requirements contained within this document.**

ISSUING OFFICE: This ITQ is managed and administered by the Commonwealth of Pennsylvania, Department of General Services (DGS), Bureau of Procurement. All inquiries should be referred to:

Kent Stimely, Commodity Specialist
Department of General Services
Bureau of Procurement,
1800 Herr Street
Harrisburg, PA 17125
Telephone: (717) 265-8933
Email: kestimely@pa.gov

TERM OF CONTRACT: Any contract issued to qualified Contractors, as a result of this ITQ, shall commence on the Contract Effective Date and shall end on 2/28/2030. There are no renewals available.

QUALIFICATIONS: Contractors interested in becoming an ITQ Contractor must meet the following requirements. Failure to meet the below requirements will result in the application for qualification being rejected. Each Contractor that meets the minimum qualifications will be awarded a contract. Award of a contract to a Contractor is not a guarantee of business.

- A. Contractors must provide documentation showing two (2) years of experience in each of the commodity codes selected under Service Categories.
- B. **Only Certified Small Businesses are Eligible for Award.** The Department of General Services has designated this contract as a Small Business Reserve (SBR). Only certified small businesses are eligible to apply for qualification and receive an award. The small business requirements and certification process can be found on the following site, [Small Business Contracting Program](#).

The Small Business Certificate will be provided after the self-certification process is completed on the SBRI site, [Small Business Contracting Program](#). A copy of your valid Department of General Services (DGS) Small Business certificate must be submitted with your application for qualification. Failure to submit a copy of your valid small business certificate or any business without a valid certificate as of the date of submission will be rejected as non-responsive. The Commonwealth shall be under no obligation to maintain current or future certificates it is the responsibility of the qualified Contractor to continue to maintain an updated copy in the JAGGAER system for the length of the contract.

C. Certifications and Rates. Contractors must submit with their application for qualification on this ITQ Contract the documentation identified herein this section. In addition, qualified Contractors are required to provide copies of these documents to using agencies upon request and maintain an updated copy in the JAGGAER system for the length of the contract.

1. Contractors must have a Pennsylvania Public Utility Commission (PUC) Operating Authority. In addition, Contractors must provide a copy of their current ***PUC Certificate of Public Convenience to Operate as a Commercial Carrier of Property for Compensation Between Points in Pennsylvania***. The Commonwealth shall be under no obligation to maintain current or future certificates; it is the responsibility of the qualified Contractor to continue to maintain an updated copy in the JAGGAER system for the length of the contract.
2. Contractors attempting to qualify under the service category 78140000-ITQ-289 Moving Services- Employee Household Goods, must provide a copy of their current ***PUC Motor Carrier of Household Goods Certificate***. The Commonwealth shall be under no obligation to maintain current or future certificates; it is the responsibility of the qualified Contractor to continue to maintain an updated copy in the JAGGAER system for the length of the contract.
3. Contractors must have their ***Household Move Rates*** filed with, and approved by, the PUC. Contractors must provide a copy of their current approved rates with their application for qualification. The Commonwealth shall be under no obligation to maintain future approved household move rates; it is the responsibility of the qualified Contractor to continue to maintain an updated copy in the JAGGAER system for the length of the contract.
4. Contractors must offer various options for valuation coverage to their customers. Valuation coverage refers to the extent to which the Contractor will compensate the customer for any damages or losses that occur during the moving process or while property is stored. Contractors must provide a copy of their coverage options with their application for qualification.
5. **Ancillary Services and Moving Supplies Lists.** Contractors must provide with their application for qualification a product list of available ancillary moving services and moving/packing supplies which you are capable of providing. Items such as, but not limited to, truck rental, fuel surcharges, travel time, boxes, packing tape, etc. These supplies and services may be procured as part of a procurement of moving and/or storage services.
6. **Certificate of Insurance.** The Public Liability and Property Damage Insurance certificate is required at the time of the ITQ Contract prequalification and must be provided with subsequent RFQs to confirm validity dates. All insurance certificates provided for qualification purposes must specify the following name and address as the certificate holder: Commonwealth of Pennsylvania, Department of General Services, 1800 Herr Street, Harrisburg, PA 17125.

D. Domestic Workforce Utilization Certification. Contractors are required to complete and submit the Domestic Workforce Utilization Certification form with your application for qualification.

E. Iran Free Procurement Certification Form. Contractors are required to complete and submit the Iran Free Procurement Certification form with your application for qualification.

SERVICE CATEGORIES: Contractors will need to choose the appropriate commodity code(s) to qualify for this contract. Contractors will select the appropriate code(s) under the Business Details section of the qualification process. The Commonwealth may add additional commodity codes as the need arises. The table below lists the appropriate commodity code and description of each category.

COMMODITY CODE	DESCRIPTION OF CATEGORY
78140000-ITQ-500 Moving Services – Office	This service category includes the preparation, transportation, and relocation of equipment, furniture, files, and other miscellaneous office content (Property) as specified by the requester. Property includes but is not limited to freestanding furniture; specialty office equipment; office equipment (fax, typewriter, printer, etc.); high-density file systems; file and storage systems; file cabinets (empty or loaded); office and storage contents; safes; palletized stock; shelving and active archival records; records center and archival materials; and other miscellaneous office equipment and supplies. These moves may include location to location, within a location, and multi-staged moving services. Contractors must possess the appropriate expertise to orderly and efficiently relocate all related equipment, furniture, and contents.
78140000-ITQ-501 Moving Services- Employee Household Goods	This service category includes the preparation, transportation, and relocation of an employee’s household goods. Household goods is inclusive of, but not limited to, the following: furniture, appliances, home furnishings, fixtures, utensils, clothing, apparel, and other property owned by the employee for use in a dwelling. Note: This service category can only be used by Commonwealth employees who in accordance with Management Directive 625.3, Moving Employee Household Goods, are required to obtain moving services.
78130000-ITQ-502 Storage Services	This service category includes the preparation, staging, storage, and transportation of Commonwealth property, to and from the requestor, or as specified in the agency request. Commonwealth property includes, but is not limited to, office equipment, office furniture, storage and filing equipment, files, supplies, and any other property specified by the requesting agency. This category also includes kitchen, living, and residential equipment furniture used in Commonwealth managed facilities such as hospitals, veterans’ homes, prisons, etc., and any other property specified by the requesting agency. All Commonwealth property must be stored in a facility which is secure, weatherproof, free from rodents, safe from mold and mildew, contain lighting for viewing content, and access for Commonwealth and requesting agency personnel.
78140000-ITQ-503 Moving Supplies	This service category includes providing any supplies and products which the Contractor may offer, to be used by the requestor to prepare property for moving. These materials include, but are not limited to, boxes, computer bags, various types of tape, bubble wrap, dollies, etc.

78140000-ITQ-504 Relocation Coordinator	Contractor will be responsible to plan, organize, schedule, and coordinate relocation services for using agencies. The Contractor must coordinate all activities with the using agencies contracted moving service provider (selected through this ITQ Contract). The Contractor must assign a professional representative to manage all aspects of each relocation service. This representative may be required to be on-site during the move, if required by the requestor. Relocation services may also include: • Relocation of property to multiple locations. • Coordinate with the DGS Bureau of Supplies & Surplus Operations on the movement or processing of property to be declared surplus, in conjunction with the relocation services. • Identifying resources/locations of Commonwealth agencies in need of property being relocated or surplus. • Coordinating removal and disposal of property with the Decommission Services provider.
78140000-ITQ-505 Decommission Services	Contractor will be responsible for the proper disposal of Commonwealth property, in conjunction with moving and storage services purchased through this ITQ. Contractor will be responsible for verifying with the requestor the types and volumes of property to be disposed of and to coordinate the schedule and removal of property with all participating parties (i.e., other contracted resources, the requestor, the landlord/building manager, etc.). The property to be decommissioned will vary by requestor, but may include without limitation, unusable, damaged, or broken furniture, metal and metal scraps, electronic equipment, wiring and electrical waste, trash, etc. All services must be performed in accordance with all local, federal, and state government regulations, policies, and procedures. In addition to any policies of the owner of the physical property (facility/building). It is the responsibility of the contractor to identify all applicable regulations and policies and ensure compliance. The Contractor must include any fees associated with property disposal in their quote.

GENERAL INFORMATION/REQUIREMENTS:

- A. Service Category 78140000-ITO-288 Moving Services – Office:** DGS has established the following policy, in accordance with the requirements of Title 62, The Procurement Code (Section 301). Prior to issuing any Request for Quotes (RFQ) under this category using agencies **must** first submit a moving request to the Department of General Services, Bureau of Supplies and Surplus Operations (BSSO). All inquiries should be submitted to Sue Umbrell (717-783-6471), sumbrell@pa.gov. If BSSO cannot perform the services, they will provide an official response (email). This official response must be retained with your RFQ file and attached to any subsequent purchase order. If BSSO can perform the services, they will provide a quote and coordinate arrangements with the requestor.
- B. Service Category 78140000-ITO-289 Moving Services-Employee Household Goods:** This service category **can only be used by** Commonwealth employees who in accordance with Management Directive 625.3, Moving Employee Household Goods, are required to obtain moving services. Any household moves 40 miles or less must be quoted on an hourly basis, based on trucks needed and manpower needed. All household moves over 40 miles will be based on the weight of the goods being

transported, mileage, charges for packing, fuel surcharges, and temporary storage if needed. All pricing for Household Moving Services must be submitted in response to a Request for Quote.

C. **Exclusions:** DGS has other established contracts and policies for the moving of specific types of Commonwealth property. As a result, the Commonwealth-owned equipment, furniture, and property identified in this section are excluded from this contract. Requesting agencies should use the appropriate statewide contracts, if identified below, or procure relocation services for these items in accordance with established procurement policy. Please refer to the DGS EMarketplace website for more information on these contracts.

1. Systems Furniture (cubicles): Agencies must use the DGS statewide Commercial Furniture Contract.
2. Firearms, Explosives, Flares/Fuses, Ammunition, & other Related Material: There is **NO** contract in place for these items.
3. IT Peripherals (Computers, Small MFDs): Agencies must use the appropriate statewide IT Equipment Contracts (Desktops/laptops, Workstation Computing devices, etc.)
4. Telephone Systems and Equipment: Agencies must use the appropriate statewide IT Equipment Contracts.
5. Leased Copiers/MFDs: This equipment must be moved by the Contracted lessor. Agencies must use the statewide contracts for Digital Multifunctional Devices (MFDs).

D. **Damages:** This section applies to damages caused by the Contractor at any time while performing contracted services (during preparation, transportation, storage, packing, moving, etc.). This policy applies to all Commonwealth property, including equipment, furniture, supplies, documents, electronics, and physical property such as floors, walls, etc. The responsibility to “repair, replace, or otherwise correct” the damaged property lies with the Contractor. The property must be restored to its pre-damaged condition or replaced with a new item of equal estimated value. The estimated value will be determined as identified herein.

1. If the property can be repaired, the amount of damages can be set at the amount it costs to repair the property.
2. If the cost to repair the property turns out to be more than the fair market value of the property, before the loss, the damages may be limited to the fair market value.
3. The fair market value will be determined by either showing the original purchase price or the price of a new comparable item to purchase. The lower of these two costs, less the depreciation of the item, will be identified as the fair market price.
4. Depreciation amounts will be determined by dividing the original/replacement price by 7 and using this amount to reduce the value by the fourth year. The item will not be devalued by more than four years of depreciation.

E. **Type of Contract:** Upon determination that the Contractor meets the ITQ requirements, the Commonwealth will issue a contract to the Contractor. Upon receipt of a Purchase Order (PO) issued under this Contract, the Contractor agrees to furnish the requested services to the Commonwealth agency issuing the PO.

F. **Post Award Administration:** The Contractors’ performance shall be monitored and evaluated in accordance with the requirements outlined in the contract and the agencies’ requests for quotes. At a

minimum, the contractors' performance shall be evaluated on an annual basis. Contractors may be required to attend contract performance review meetings. These meetings will be for the purpose of providing contractor performance reviews, discussion of issues either party may have concerning the contract or to evaluate the overall progress of the contract. The meetings will be held quarterly, semi-annually or annually at the discretion of the Department of General Services, or upon special request of the using agency.

G. Reporting Requirements: The awarded Contractors shall prepare and submit to the Contracting Officer an annual report detailing contract activity. The report shall be submitted no later than 15 calendar days following the end of each contract year. The report should be created in Microsoft Excel® format and e-mailed to the Contracting Officer of record.

1. Moving Services Reports must include, at a minimum, the following data elements: requesting agency, dates of service, purchase order number, originating address, destination address, distance travelled from point A to point B, and Total cost.
2. Storage Services Report must include, at a minimum, the following data elements: requesting agency, dates of service, purchase order number, pickup location, type of storage location, types of items being stored, i.e., furniture, equipment, files, etc., and total cost.

H. REQUEST FOR QUOTES (RFQ) PROCEDURES: Commonwealth Agencies will issue an RFQ to qualified Contractors, through the Commonwealth's Custom Portal, powered by the JAGGAER system. Contractors will respond to the RFQ in the system. The requesting Agencies may require the qualified Contractors to furnish, upon request, additional documentation in the RFQ. The qualified Contractors selected for the RFQ process will receive a Purchase Order (PO) and will supply the service to meet the specific requirements as indicated in the RFQ. Agencies will exercise a scoring method based upon the criteria set forth in the RFQ. The Scoring Methods are defined as follows:

- Best Value: Refers to the process of selecting the quote which provides the greatest value to the agency based on evaluating and comparing all pertinent criteria, including cost, so that the Contractor whose overall proposal best suits the agency's needs is selected for each individual project; and
- Low Cost: Refers to the lowest cost quoted from all proposals received that are deemed both responsive and responsible for the project.

I. COSTARS Purchasers. Section 1902 of the Commonwealth Procurement Code, 62 Pa.C.S. § 1902 ("Section 1902"), authorizes local public procurement units and state-affiliated entities (together, "COSTARS Members") to participate in Commonwealth procurement contracts that the Department of General Services ("DGS") may choose to make available to COSTARS Members. DGS has identified this ITQ as one which will be made available for COSTARS Members' participation.

1. Only those entities registered with DGS are authorized to participate as COSTARS Members in this Contract. A COSTARS Member may be either a local public procurement unit or a state-affiliated entity.
 - a) A "local public procurement unit" is:
 - Any political subdivision (local government unit), such as a municipality, school district, or commission;
 - Any public authority (including authorities formed under the Municipality Authorities Act of 1955 or other authorizing legislation, such as the Public Transportation Law or the Aviation Code);
 - Any tax-exempt, nonprofit educational institution or organization;
 - Any tax-exempt, nonprofit public health institution or organization;

- Any nonprofit fire, rescue, or ambulance company; and
- Any other entity that spends public funds for the procurement of supplies, services, and construction (such as a council of governments, an area government, or an organization that receives public grant funds).

The Department reserves the right to review and determine eligible applicants as Local Public Procurement Units on a case-by-case basis.

- b) A state-affiliated entity is a Commonwealth authority or other Commonwealth entity that is not a Commonwealth agency. The term includes:
- The Pennsylvania Turnpike Commission;
 - The Pennsylvania Housing Finance Agency;
 - The Pennsylvania Municipal Retirement System;
 - The Pennsylvania Infrastructure Investment Authority;
 - The State Public School Building Authority;
 - The Pennsylvania Higher Education Facilities Authority, and
 - The State System of Higher Education.

The COSTARS Program is not available for use by Executive Agencies and Independent Agencies as defined by the Commonwealth Procurement Code, or any agency or entity using funds appropriated to the Department of General Services through Capital Budget Project Itemization legislation for the procurement of furniture, fixtures, and equipment.

- c) A complete list of local public procurement units and state-affiliated entities that have registered with DGS and that are authorized to procure items from the Contract can be found at <http://www.costars.state.pa.us/SearchCOMember.aspx>.
2. COSTARS Members have the option to purchase from this Contract, from any DGS contract established exclusively for COSTARS Members in accordance with the requirements of Section 1902, from any other cooperative procurement contracts, or from their own procurement contracts established in accordance with the applicable laws governing such procurements. The Contractor understands and acknowledges that there is no guarantee that a COSTARS Member will place an order under this Contract, and that the decision to procure from this Contract is within the sole discretion of each COSTARS Member.
 3. DGS is acting as a facilitator for COSTARS Members who may wish to purchase under this Contract. COSTARS Members that participate in this Contract and issue purchase orders ("POs") to Contractors are third party beneficiaries who have the right to sue and be sued for breach of this Contract without joining the Commonwealth or DGS as a party. The Commonwealth will not intervene in any action between a Contractor and a COSTARS Member unless substantial interests of the Commonwealth are involved.
 4. COSTARS Members electing to participate in this Contract will order items directly from the Contractor and be responsible for payment directly to the Contractor.
 5. Those Contractors electing to permit COSTARS Members to procure from this Contract shall pay the Required Administrative Fee applicable to the Contractor's classification:

Contractor Classification	Required Administrative Fee
DGS-verified Small Diverse Business Contractor	\$166

DGS Self-Certified Small Business Contractor	\$500
All Other Contractor	\$1,500

- a) Each Contractor electing to permit COSTARS Members to participate in the Contract must submit the COSTARS Program Election to Participate form with its bid submittal and pay the applicable Administrative Fee upon Contract award in order to sell the awarded items/services to COSTARS Members. If the Contractor is a Department of General Services Self-Certified Small Business or Department of General Services-verified Small Diverse Business, a copy of its active Small Business Contracting Program certificate must be included with the bid submittal.
 - b) At the beginning of each Contract year and upon any Contract renewal, the Contractor shall submit a check for the required amount, payable to “Commonwealth of PA”. The Contractor must pay the Administrative Fee at each contract renewal date to continue to sell the awarded items/services to COSTARS Members.
6. DGS has registered the COSTARS name and logo (together, the “COSTARS Brand”) as a trademark with the Pennsylvania Department of State. Therefore, the Contractor may use the COSTARS Brand only as permitted under in this Subsection.
- a) The Contractor shall pay the Administrative Fee covering its participation in the program, including without limitation any use of the COSTARS Brand, for each year of the Contract period. The fee is payable upon Contract award and prior to the renewal date for each succeeding Contract period.
 - b) DGS grants the Contractor a nonexclusive license to use the COSTARS Brand, subject to the following conditions:
 - The Contractor agrees not to transfer to any third party, including without limitation any of its subcontractors or Contractors, any privileges it may have to use the COSTARS Brand under this Contract.
 - The Contractor agrees not to use the COSTARS Brand to represent or imply any Commonwealth endorsement or approval of its products or services.
 - The Contractor is permitted to use the COSTARS Brand in broadcast, or Internet media solely in connection with this Contract and any other Contract with the Commonwealth under which it has agreed to make sales to COSTARS Purchasers. The Contractor may use the COSTARS Brand on business cards, brochures, and other print publications so long as the purpose is to identify the Contractor as a COSTARS vendor, and only so long as the required Contract fee is kept current.
 - Should this Contract terminate for any reason, the Contractor agrees promptly to remove the COSTARS Brand from any and all print and electronic media and to refrain from using the COSTARS Brand for any purpose whatsoever from the date of Contract termination forward.
 - The Contractor agrees to defend, indemnify, and hold harmless the Commonwealth of Pennsylvania and DGS from and against all claims, demands, liabilities, obligations, costs, and expenses of any nature whatsoever arising out of or based upon the Contractor’s use of the COSTARS Brand.
 - The Contractor agrees it has no property rights in the use of the COSTARS Brand by virtue of this nonexclusive license. The Contractor expressly waives any claims, including without limitation due process claims that may otherwise be available under the law in the event of any dispute involving these terms of use.

7. The Contractor shall furnish to the DGS COSTARS Program Office a quarterly electronic Contract sales report detailing the previous quarter's Contract purchasing activity, using the form and in the format prescribed by DGS. The Contractor shall submit its completed quarterly report no later than the fifteenth calendar day of the succeeding Contract quarter.
 - a) The Contractor shall submit the reports through the web-based COSTARS Contractors' Gateway of the PA Contractor Portal at <https://paContractorportal.state.pa.us/irj/portal/anonymous>, Enterprise Applications. If a Contractor does not have access to the Internet, the Contractor shall send the reports, using the form and in the format prescribed by DGS, on compact disc via US Postal Service to the DGS COSTARS Program Office, Bureau of Procurement, 1800 Herr Street, Harrisburg, PA 17125.
 - b) For each PO received, the Contractor shall include on the report the name and address of each COSTARS-Registered Purchaser that has used the Contract along with the sales date, and dollar volume of sales to the specific Purchaser for the reporting period.
 - c) DGS may suspend the Contractor's participation in the COSTARS Program for failure to provide the Quarterly Sales Report within the specified time.
8. Additional information regarding the COSTARS Program is available on the DGS COSTARS Website at www.costars.state.pa.us.
 - a) If the Contractor is aware of any qualified entity not currently registered and wishing to participate in the COSTARS Program, please refer the potential purchaser to the DGS COSTARS Website at www.costars.state.pa.us, where it may register by completing the online registration form and receiving DGS confirmation of its registration. To view a list of currently registered COSTARS member entities, please visit the COSTARS website.
 - b) Direct all questions concerning the COSTARS Program to:

Department of General Services
COSTARS Program
1800 Herr Street
Harrisburg, PA 17125
Telephone: 1-866-768-7827
E-mail GS-PACostars@pa.gov

9. **COSTARS Program Election to Participate.** If the Contractor is willing to sell the awarded items/services at the same prices and/or discounts, and in accordance with the contractual terms and conditions, to COSTARS members, the Contractor should complete and return the COSTARS Program Election to Participate form which is an attachment to this ITQ. If the Contractor is asserting that it is a Department of General Services Certified Small Business, the Contractor must submit its active certification.

J. COSTARS Reporting Requirements. If you checked "Yes" in Step 6 when developing your qualification bid for the ITQ contract, you agreed to participate in the Commonwealth's COSTARS program, and you are bound by the COSTARS Purchasers Provision contained within this Statement of Work. The requirement to report COSTARS sales to DGS' COSTARS Program Office is contained in Section E of the COSTARS Purchasers Provision. By agreeing to participate in the COSTARS program, you are required to report COSTARS sales to DGS on a quarterly basis. Even if you had no

COSTARS sales, you must file a report.

COSTARS sales for the ITQ contract can now be reported through the automated COSTARS sales reporting system located on the COSTARS website. Information required will be your vendor number, contract number, date of sale, customer name and the amount of the sale. It is also recommended that you record the COSTARS Member ID number. Detailed instructions appear below.

The deadline for submitting sales information is the 15th day of the month following the end of the quarter. Failure to report COSTARS sales is in breach of contract and may result in DGS suspending your participation in the COSTARS program.

Note: This system is to be used to record sales to COSTARS members ONLY! ZERO sales for a particular quarter must also be reported.

INSTRUCTIONS FOR COSTARS SALES REPORTING FOR STATEWIDE CONTRACT CONTRACTORS

- Go to www.dgs.state.pa.us/costars. ‘Click’ on the Contractors button.
- ‘Click’ on the COSTARS Contractors’ Gateway link on the right. Click on the State Contract link.
- Enter your Vendor Number to gain access to the system. When your Vendor Number is found, you will be taken to the Sales Reporting Authorization screen.
- Enter your first and last name. ‘Click’ Continue.
- You will be taken to the Sales Reporting Screen. Select from the Contract Number dropdown the Contract Number you want to report sales for and then ‘click’ the Continue button located next to it.
- To enter a new Sale or to report “No Sales this Quarter”, ‘click’ on the Insert button at the top left.
- Enter the Customer Name or part of the Customer Name into the Customer Search field. If you are reporting “NO SALES THIS QUARTER”, type NO SALES into the search field. ‘Click’ the Search button.
- Select the Customer Name from the dropdown list or select NO SALES THISQUARTER. To proceed, you will need to ‘click’ on the Continue button to the right of the list. The system will locate the Customer Name in the Members database and will pre-fill the Address and County fields for you.
- You will then enter a Sales Date and Sales Amount.
- ‘Click’ on the Save button. The data is saved and immediately accessible by COSTARS Program staff. For your convenience, there is also a Sales Reporting Manual – for Statewide Contracts in the Resource Center on this site. For additional assistance or questions, please call 1-866-768-7827.