



December 7, 2010

Commonwealth of Virginia  
Department of General Services  
Division of Purchases and Supply

**Statewide Term Contract**  
**E194-524-VP: Household Moving Services**

**Contract Period:** January 1, 2011 through December 31, 2011

**Authorized Users:** Commonwealth of Virginia agencies and other public bodies.

**NIGP Commodity Codes:** 96256

**Contractor:**

**Kloke Group**

**1855 Boulevard West**

**Richmond, VA 23230**

DUNS #: 130532005

eVA Vendor Number: C15054

*Kloke is an agent for Mayflower Transit* **FAX: 540-735-0179**

**Donna Robinson**

**National Accounts Relocation Manager**

**866-666-7679 Direct (Office)**

**Cell: 540-840-5131**

**[drobinson@kloke.com](mailto:drobinson@kloke.com)**

VIEW AND PRINT THIS CONTRACT AND ANY CHANGES AT: [www.eva.virginia.gov](http://www.eva.virginia.gov)

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

A handwritten signature in cursive script that reads "Matt Manion".

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Matt Manion, CPPO, C.P.M., VCO  
Statewide Services Contract Officer  
Department of General Services  
Division of Purchases and Supply  
1111 E. Broad Street, 6th Floor  
Richmond, VA 23219  
Telephone: 804-786-2397  
Fax: 804-786-5413  
Email: [Matt.Manion@dgs.virginia.gov](mailto:Matt.Manion@dgs.virginia.gov)

## **INTRODUCTION**

This optional-use statewide term contract is established as a result of Request for Proposal (RFP) 86, Household Moving Services, issue date May 21, 2007, and all IFB terms, conditions and amendments are incorporated into this contract. Reference eVA e-procurement folder # 15843. The purpose of this contract is to make available household moving services as may be required by Commonwealth of Virginia agencies and other public bodies.

## **INSTRUCTIONS**

1. **ORDERS:**
  - A. Unless otherwise instructed by the Division of Purchases and Supply, all departments, institutions and agencies of the Commonwealth of Virginia will place orders through eVA.
  - B. For other public bodies including Virginia localities, cities, counties, towns and political subdivisions, orders will be placed through eVA to the maximum extent possible.
2. The applicable contract number and contractor name and DUNS number must be shown on each purchase order.
3. Inspection of the services provided and approval of contractor's invoice is the responsibility of the ordering state agency or other public body.
4. Any complaint as to quality, faulty or delinquent delivery, or violation of contract provisions by contractor shall be reported to the contractor using the "Procurement Complaint Form" available from the Division of Purchases and Supply web site at [www.eva.state.va.us](http://www.eva.state.va.us) under the "Buyers" tab (see Vendor Complaint Form link). A copy of the "Procurement Complaint Form" must be forwarded to the DPS contract officer identified on the first page of this contract.
5. **RENEWAL OF CONTRACT:** This contract may be renewed by the Commonwealth for one (1) successive one year period under the terms and conditions of the original contract except as stated in 1 and 2 below. Price increases may be negotiated only at the time of renewal. Written notice of the Commonwealth's intention to renew shall be given approximately 90 days prior to the expiration date of each contract period.
  1. If the Commonwealth elects to exercise the option to renew the contract for an additional one-year period, the contract price(s) for the additional one year should not exceed the contract price(s) of the original contract increased/decreased by more than the percentage increase/decrease of the Consumer Price Index, Commodity and Service Group, Transportation Services category of the CPI-W section of the Consumer Price Index of the United States Bureau of Labor Statistics for the latest twelve months for which statistics are available.

2. If during any subsequent renewal periods, the Commonwealth elects to exercise the option to renew the contract, the contract price(s) for the subsequent renewal period should not exceed the contract price(s) of the previous renewal period increased/decreased by more than the percentage increase/decrease of the Consumer Price Index, Commodity and Service Group, Transportation Services category of the CPI-W section of the Consumer Price Index of the United States Bureau of Labor Statistics for the latest twelve months for which statistics are available.

**AGREEMENT FOR TRANSPORTATION SERVICE**

**BETWEEN**

**THE KLOKE GROUP, AN AGENT FOR  
MAYFLOWER TRANSIT**  
with its principal place of business at:  
10 East Belt Blvd  
Richmond, VA 23224

**AND**

**COMMONWEALTH OF VIRGINIA**  
**("SHIPPER")** with its principal place of business at:  
1111 E. Broad Street  
Richmond, VA 23219

1. **Subject of Agreement.** In accordance with the terms and conditions of this Agreement, Carrier agrees to provide, and Shipper agrees to avail itself of Household Goods transportation services (hereinafter the "Services") on a non-exclusive basis for a series of shipments of Household Goods as defined under the Interstate Commerce Act 49 USC 13102(10), ("Household Goods") moving between points in the United States (excluding Alaska and Hawaii) and moving transborder between points in the United States (excluding Alaska and Hawaii) and Canada. Each shipment accepted for transportation shall move (a) on a Uniform Household Goods Bill of Lading and Freight Bill or (b) such other document as the parties may agree to use; provided that, if there shall be any contradiction or inconsistency between terms printed on such Bill of Lading or other document and the terms of this Agreement, the terms of this Agreement shall control.
2. **Term.** This Agreement shall be effective as of the date received by Carrier and shall be effective for an initial term of two years. Subsequent to the initial term, this Agreement may be renewed upon mutual consent of both parties in twelve-month increments. Either party may cancel this Agreement by giving the other party 15-day written notice.
3. **Modification.** Modification may only be made in writing(s) signed by both parties. This Agreement may be modified by including other subsidiary companies, divisions, or affiliates, but the Agreement terms contained herein shall not include any shipments loaded prior to such modification.
4. **Payment.** Carrier shall submit to Shipper invoices for Services provided by Carrier pursuant to this Agreement, including Schedule A, attached hereto and incorporated herein, upon performance of such Services, and Shipper shall pay said invoices in thirty (30) days from the date of the invoices.

5. **Notification.** All notices and/or changes shall be in writing to:

COMMONWEALTH OF VIRGINIA  
1111 E. Broad Street  
Richmond, VA 23219

TheKloke Group  
10East Belt Blvd  
Richmond, VA  
23224

6. **Severability.** If any part, term or provision of this Agreement is determined unlawful or unenforceable, the remainder shall remain in full force and effect.

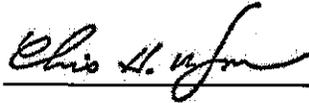
7. **Assignment.** Neither party may assign nor attempt to assign any part of this Agreement to any other party.

8. **Governing Tariffs.** Additional terms and rates may be included in schedules and/or addenda attached to this Agreement and signed or initialed by both parties. Any terms not covered explicitly in this Agreement shall be governed by the rules, regulations, services and rates set forth in Carrier's Tariff HGB 400-N and Exceptions Tariff HGB 104-G and AERM 403-A for Motor Vehicles, including their additions, supplements, revisions, and modifications which are hereby incorporated by reference and made a part hereof.

COMMONWEALTH OF VIRGINIA

THE KLOKE GROUP,  
An agent for Mayflower Transit

By: \_\_\_\_\_

By: 

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

Chris H. Wynn

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

Title: Senior Director, Contract Business

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

Date: November 29, 2007

## SCHEDULE A

**Domestic Discount.** Carrier shall provide a 62% reduction from Tariff HGB 400-N/104-G rates (excluding those rates pertaining to Storage-In-Transit, Pick-Up and Delivery from Storage-In-Transit, Third-Party Services and Valuation Charges) on all Household Goods shipments moving between points in the United States (excluding Alaska and Hawaii).

**Canadian Discount.** Carrier shall provide a 62% reduction from Tariff HGB 400-N/104-G rates (excluding those rates pertaining to Storage-In-Transit, Pick-Up and Delivery from Storage-In-Transit, Third-Party Services and Valuation Charges) on all Household Goods shipments moving transborder between points in the United States (excluding Alaska and Hawaii) and Canada.

**Storage-In-Transit Discount.** Carrier shall reduce the applicable rates for Item 185 (Storage-In-Transit) and Item 210 (Pick-Up and Delivery from Storage-In-Transit) by 50% (35% within the provinces of Canada).

**Domestic Vehicle Transportation.** Motor vehicles moving between points in the United States (excluding Alaska and Hawaii) will be transported under the terms of the Carrier's AERM 403-A Motor Vehicle Tariff. Carrier shall provide the following reductions to the transportation rates on Sections 3, 4 and 5:

| Mileage              | Discount |
|----------------------|----------|
| Up to 1,500          | 15%      |
| 1,501 t 3,000        | 20%      |
| 3,100 miles and over | 25%      |

The discounts do not apply to Note 1 – Valuation, Note 4 – Oversized Vehicle Charge or Note 6 – In-Van/Open Car Carrier Charge of Tariff AERM 403-A.

**Rate Actions.** The rate levels to be reduced are those in effect in Tariff HGB 400-N/104-G and AERM 403-A from the date this agreement becomes effective, and will be frozen at this level for a 24-month period. At the end of the first 12-month period, and any subsequent 12-month period, all rates will be increased annually using the U.S. Department of Labor Consumer Price Index for All Urban Consumers (CPI-U) for "Services".

The increases will be based on the Unadjusted Percent of Change in the CPI-U "Services" index from four months prior to the effective date of this Agreement. For example, an agreement with a January 1<sup>st</sup> effective date would require using a September-to-September basing period.

**Discount reduction(s) will be adjusted to reflect any increase.**

No annual increase in any 12-month period shall exceed 3%.

**Peak Rates.** Carrier shall waive peak transportation rates provided in Tariff HGB 400-N/104-G.

**Carrier's Liability.** Carrier's liability for loss or damage to goods being transported shall be determined in accordance with the relevant provisions of the Referenced Tariffs, modified as provided in this section.

Carrier's liability shall be that of a common carrier and be subject to 49 U.S.C. 14706 and Part 370 et. seq. of Title 49 of the Code of Federal Regulations with regard to claims and actions for loss or damage to property transported pursuant to this Agreement. Carrier's liability on an item-by-item basis and maximum liability for loss and damage shall be as follows:

- **Household Goods**

- A. Full Value Protection, which means that for any item(s) lost or damaged while in Carrier's custody, Carrier will either repair, replace with like kind or pay the replacement value of such item, at Carrier's option, and in accordance with Item 403 of exceptions Tariff 104-G of the Referenced Tariffs.

- (1) Carrier's maximum liability for loss or damage shall be the lesser of \$6.00 per pound times the actual weight of the shipment or \$100,000.

- There shall be no charge for such coverage.

- Coverage increasing the maximum level of liability set forth in A. (1) above, may be obtained by the Shipper's employee declaring such additional amount on the Bill of Lading. The rate for such additional amount shall be \$.40 per \$100.00 additional value. If the Shipper's employee fails to declare additional valuation on the Bill of Lading, the Carrier's maximum liability shall be as set forth in part A. (1) of this Section.

- B. Notwithstanding the foregoing, Carrier's liability for loss or damage to Extraordinary Value Items (an Extraordinary Value Item shall mean an item whose value exceeds \$100.00 per pound based upon actual weight) shall be limited to \$100.00 per pound per article unless such items are disclosed in writing to Carrier by Shipper or Shipper's employee. Carrier shall provide Shipper or Shipper's employee with Carrier's form for the purpose of making such disclosure. Upon disclosure of the Extraordinary Value Items to Carrier, Carrier's maximum liability for loss or damage to such item shall be the maximum liability amount as provided in Paragraph A hereof.

- **Motor Vehicles**

- Notwithstanding the foregoing Carrier's liability for loss or damage to Motor Vehicles shall be the lesser of the cost to repair or the maximum amount under Section 3, 4 and 5 in the Referenced Tariff based on the section selected by the Shipper.

**Pairs and Sets.** Carrier's full value protection will include coverage for loss or damage to household goods when part of a pair or set. If a lost item is part of a pair or set that cannot be matched Carrier will either pay the replacement value of the pair or set or replace the pair or set. If a damaged item of a pair or set can be repaired and will match the other item(s) in the pair or set, the Carrier has the option to repair the item and is not required to replace the pair or set. The carrier has the right to salvage any pair or set for which a replacement value cash settlement is made or to salvage the pair or set if the pair or set is replaced.

**Mechanical and Electrical Malfunction.** Carrier agrees to accept responsibility for the repair, recalibration and/or adjustment of electronics and appliances proven damaged during transit and/or storage regardless of external damage (or lack thereof) provided the item(s) in question are examined by a qualified electronics expert and that the claimed damage is professionally determined to have been caused by Carrier mishandling and not due to normal road vibration or

inherent vice which are beyond the Carrier's control. This item does not apply to motorized vehicles of every description and watercraft of every description. This coverage does not extend to pre-existing conditions and/or normal maintenance and cleaning.

**Retirees/Employees Shipments.** The Agreement discounts and services shall also apply to retirees and employees of Shipper, provided Shipper issues a letter of authorization to Carrier which indicates the retiree/employee should be entitled to the terms of the Agreement. Shipper shall be shown on the shipping documents as a co-shipper, along with the individual retiree/employee. Freight charges for these relocations will be collected from the retiree/employee on a COD basis at the time of delivery. Carrier may elect to accept individual retiree/employee's American Express, MasterCard, Visa, or Discover financial service products as payment for all rates and charges. However, arrangements must be made with the Carrier agency prior to load date.

**Fuel Costs.** Item 16 (Fuel Cost Price Adjustment) of Carrier's referenced Tariffs HGB 400-N and AERM 403-A shall be applicable to this Agreement. The Fuel Surcharge will apply on all discounted charges for transportation, including pick-up and/or delivery charges for Storage-In-Transit.

**Insurance Related-Revenue Surcharge.** Item 60 (Insurance Related General Increase) of Carrier's referenced Tariff HGB 400-N shall be applicable to this Agreement. The Insurance Related Revenue Surcharge will apply on all discounted charges for transportation, including pick-up and/or delivery charges for Storage-In-Transit.

**Performance Promise.** For household goods shipments, Carrier agrees to pay Shipper per diem claims for late pickup or delivery based upon the governing provisions as published in Item 402 (Guaranteed Pickup & Delivery) of HGCB Exceptions Tariff 104-G. For motor vehicle transportation, Carrier agrees to reimburse Shipper for late delivery based upon the governing provisions of Item 7-1 in AERM 403-A.

**Claims Settlement Guarantee.** For household goods shipments, Carrier will offer expedited claim settlement service based upon the governing provisions as published in Item 425 (Expedited Claim Settlement Service) of HGCB Exceptions Tariff 104-G.

**Overtime.** The rates in Item 175 that apply overtime charges for Saturday, Sunday or Holiday pick-ups or deliveries shall be waived.

**Extra Stopoff Fee.** The Extra Stopoff Fee referenced in Item 28 shall be waived.

## **Contents of the Kloke Group Proposal:**

### A. Operations:

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

We realize that you have many choices in determining your relocation provider and to be chosen is a privilege, not a right. We have the burden of rewarding your choice with the level of service and excellence you deserve. We will accomplish this through the achievements of our company and the individual actions of our personnel. We will approach every relocation for the Commonwealth with the following in mind;

#### **Innovation**

- Listening to you and your employees and responding to every requests

#### **Consistency**

- Getting your employees settled-in as soon as possible move-after-move

#### **Stability**

- Over 75 years experience as a Van Line and over 20 years experience as an agent for Mayflower Transit

#### **Solutions**

- Creating needs-based technology and constantly elevating transportation standards

We pledge to deliver a consistently superior level of quality of service to the Commonwealth by employing skilled, experienced professionals who appreciate the important role they play in our customers' lives and careers. As a result, the Commonwealth will be served by professional sales representatives, trained and uniformed crew members, accurate estimating, on-time packing/loading and delivery, timely processing of paperwork and assistance in the claims process.

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

- A. The Selected Offeror will provide intrastate, interstate, and local transportation of household goods and in transit storage for employees of the Commonwealth and other Political Subdivisions.

The Kloke Group, an agent for Mayflower Transit, is a full-service relocation provider possessing all the necessary licensing and permits to provide service on a local, intrastate and interstate basis for the Commonwealth.

- B. The Selected Offeror(s) will provide information to the employee of the Commonwealth about packing, moving, in-transit storage and unpacking of household goods, and discarding of all debris at destination.

Through the utilization of a dedication relocation manager, the employee will receive a pre-move package outlining details of the entire moving process in addition to a verbal consultation. The employee will be given a toll-free number to reach the relocation manager in the event a question arises or the scope of the move changes anytime throughout the process of the move.

- C. The Selected Offeror(s) will provide an estimate to the employee prior to final move Arrangements.

Once the Kloke Group has been notified by the Commonwealth of an upcoming relocation, the relocation manager will assign a professional sales representative to perform an in-home survey in order to determine the amount of household goods to be moved and services to be performed. The relocation manager will utilize the results of the survey to provide the employee with a clear and concise written estimate that will outline the requested services to be performed and the costs associated with each.

- D. The Selected Offeror(s) will provide or assist in arranging supplemental services relating to the movement of household goods such as auto transport, pet transport, playground equipment, storage, etc. Costs associated with the supplemental services are usually the sole responsibility of the end user, however there may be situations where some or all of these items may be covered by the Agency authorizing the move.

Upon completion of the in-home survey, the relocation manager will assess the need for any third party services. The Kloke Group along with Mayflower Transit only employs the most reputable third party service providers to assist us with the relocation of our customers. The relocation manager will be responsible for the determination and

coordination of any additional services. In the event the employee is responsible for such charges, we will collect any charges associated with such services directly from the employee. Our network allows us to perform any type of service that may be associated with relocation.

- E. All individual movers employed by the Selected Offerer(s) should be able to speak and understand English, they must be trained, certified moving professionals who have worked as permanent employees of the offeror. These professionals will be uniformed, clean, sober, drug free, helpful and friendly.

As a quality agent for Mayflower Transit, we realize that quality service is a by product of a positive attitude towards service to the public, a positive feeling about one's job and the company, an effective training program and a continuous series of performance evaluations, including customer feedback.

Each applicant must demonstrate the ability to read and write the English language. Each applicant is interviewed and required to sign a release for drug and alcohol screening; a pre-employment screening is required. References and criminal records are checked and must comply with the standards set by Mayflower Transit, which is among the highest standard in the industry. All drivers must meet stringent requirements under DOT and Federal Motor Carrier Regulations. Further, all driver records are forwarded to our insurance provider for review and approval.

The Kloke Group employs a full-time quality control person who conducts Mandatory classroom training sessions prior to on-the-job training. In addition to the training required by Mayflower Transit on how to pack and properly handle furniture, basic training on personal conduct and courtesy in customer's homes is also provided. Proper uniforms and appearance of our personnel is mandatory.

- F. The Selected Offeror(s) will provide the employee or retiree all services outlined in the Selected Offeror(s) estimate and accepted by the employee, including but not limited to: packing, moving and unpacking of household goods, and discarding of all debris at destination.

The relocation manager will be accountable in assuring that all services are performed in accordance with the initial estimate as well as in conjunction with any change orders initiated. This is accomplished through continuous communication before, during and after the move.

- G. The Selected Local Offeror(s) will detail an effective and comprehensive quality program, including how all members are trained, where the training is conducted and any certifications that are required.

See exhibit A.

- H. The Selected Local Offeror(s) will detail a communication process to be utilized throughout the household goods move. This will include shipment tracking capabilities and technological tools used.

A daily task list is generated by move management software that reminds and requires the relocation manager to perform the following tasks for every relocation.

- A. Confirm order to ensure they're within transit guidelines
- B. Call customer to confirm all information
- C. Send confirmation letter to customer
- D. Check with Van Line to confirm registration of order
- E. Confirm van assignment
- F. Call customer to confirm pack date
- G. Call customer to confirm load date
- H. Check delivery ETA
- I. Verify delivery of shipment
- J. Call customer to advise of delivery and review customer survey
- K. Generate Thank You Letter

Interstate shipments can be tracked at anytime by visiting the Mayflower website at [www.mayflower.com](http://www.mayflower.com) or calling the relocation manager. Intrastate and local shipments can be tracked by contacting the relocation manager.

- I. The Selected Offeror(s) will detail the types of reports to be provided to the Commonwealth, and the authorized contract user, including quality ratings, transportation costs, shipment activity and claims handling.

At the conclusion of each move, our customers are asked to grade us on how we served them. Survey results are compiled using a state of the art on line reporting system. Data available through this on-line reporting system includes customer survey results – including quality ratings, transportation costs, shipment activity and claims handling.

- J. The Selected Local Offeror(s) will outline company provided insurance for employee's household goods while in company's

possession and in-transit storage. This would include packing and unpacking of the household goods.

Carrier's liability for loss or damage to goods being transported shall be determined in accordance with the relevant provisions of the tariff(s) and transportation agreements included in this RFP.

- K. The Selected Local Offeror(s) will outline its claims handling procedure, including the communications that will take place throughout the process.

In the unfortunate event that a claim occurs the claim process can be initiated by completing a claim form. The claim form can either be provided by the driver, relocation manager, or by going on-line and completing the automated claim form. Every claim will receive the personal attention an individual assigned to assist the employee in reaching resolution. The employee will be notified of its status throughout the entire process and can also check the status of going on-line or calling the individual assigned to the claim.

- L. The Selected Offeror(s) must have a current Carrier Authority Permits, issued by the Commonwealth, including the Virginia Department of Motor Vehicles. For information, contact the Department of Motor Carrier Services Line at 1-866-878-2582 9 (toll free). The selected Offeror(s) shall maintain all valid Property Carrier Authority Permits, required by the Commonwealth of Virginia during the term of any contract.

See exhibit B.

- M. Offeror will show how will the cost of transporting Automobile(s) will be determined.

The cost of transporting automobiles will be determined in accordance with the relevant provisions of the tariff(s) and transportation agreements included in this RFP.

- 3. Describe the Offeror(s) plan for customer service, including, but not limited to:
  - a. Capability of analyzing relocation request and making recommendations
  - b. Effective procedures for complaint resolution
  - c. Flexible procedures for the placement of orders
  - d. Emergency service to include weekends and holiday

See exhibit A.

## B. Offeror(s) Information, Personnel, References

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

### B.1.2 INTRA/INTERSTATE AGENTS

- a. Provide a brief history of the National Offerer, emphasizing its services to Higher Education and/or to major corporate accounts.

In 1927 Conrad M. Gentry and Don F. Kenworthy founded Mayflower Transit Co. in Indianapolis, In., as an alternative to railroads for customers who were interested in moving their belongings across the country on the expanding network of paved roads. In 1928 the company was re-incorporated as Aero Mayflower Transit Company. By 1932, 85 agents were linked, with the Mayflower name and nationally trademarked logo. By the decades end, more than 340 agents were affiliated with Mayflower. In 1940, Mayflower received the first 48-state operating authority from the Interstate Commerce Commission. Also during this decade, Mayflower replaced single-unit trucks with tractor-trailers and extended its transportation service to Mexico and Canada. In 1961 Mayflower became best-known name in moving according to a national survey. In the early 1970's Mayflower's network of agents increased to 650 in the United States, with hundreds more abroad. In 1995 Mayflower was acquired by Unigroup, Inc., becoming part of the nation's largest moving and storage services providers.

- b. An organizational chart indicating which individuals or positions will have knowledge of an Agreement with the Commonwealth, and the degree to which each person will be responsible to the Commonwealth's account.

John M. Lograsso – Executive Vice President, Corporate Sales/Business Development

Steven J. Dawkins – Senior Executive Vice President, Domestic Operations

Gavin Bosco – Regional Sales Manager, Mayflower Transit

- c. Number and location of agents or representatives including an up-to-date agency directory if available.

Agency directory provided.

- d. A copy of the Offeror's Interstate Commerce Commission (ICC) certificate describing the National Offeror(s)'s scope of authority.

[See exhibit B.](#)

- e. A list of road equipment owned and operated by the local agent(s) and a separate list operated by the National Offeror(s).

[See exhibit D.](#)

- f. A copy of the National Offeror(s)'s current tariff and supplements.

[See exhibit C.](#)

- g. Provide information on the company provided insurance for the employee or retiree's household goods while in possession by common carrier, packing, in-transit storage or unpacking.

[See exhibit E.](#)

- h. A description of the National Offeror's road equipment dispatch system.

[A team of dispatchers and coordinators, assigned by territory, use state of the art technology to coordinate the efforts of our nationwide network of agents.](#)

- i. A description or examples of the National Offeror(s) and local agent(s) driver training. Include copies of any service awards, if applicable.

[See exhibit A.](#)

- j. A description or examples of the National Offeror(s) and local agent(s) packer training and safety program. Include copies of any service awards is applicable.

[See exhibit A.](#)

- k. Samples of any literature or programs to be provided to Commonwealth employees and their families to prepare them for moving.

[See exhibit F.](#)

- l. A description of the procedure for verification of completion and the extent of all packing and unpacking services authorized.

Upon arrival at origin, the driver will conduct a walk-through of the residence with the employee to review the items to be packed by carrier. The employee will acknowledge completion of requested services by signing a detailed, descriptive inventory. At destination, the employee will acknowledge completion of unpacking by signing the same.

- m. A description and example of the National Offeror(s) claim follow-up and settlement procedure. Include copies of all applicable forms.

Any claim filed with Mayflower must meet minimum claim filing requirements. The claim must be filed with Mayflower in writing or on-line within nine months and must contain facts sufficient to identify the shipment (shipments) of property, assert liability for determinable alleged loss, damage, or delay, and make a claim for the payment of a specific or determinable amount of money. Bad order reports, appraisal reports, notation of shortage or damage, or both, on freight bills, the bill of lading or delivery inventory, or other shipping documents, or inspection reports issued by Mayflower or a local repair or inspection service, whether or not the extent of loss or damage is indicated in dollars and cents, will not, standing alone, be considered by Mayflower as sufficient to comply with the minimum claim filing requirements specified above.

- n. A list of local agents which have warehouse facilities.

Richmond, VA  
Office 6000 SF  
Warehouses (s) 80,000 SF

Fredericksburg, VA  
Office 700 SF  
Warehouse 120,000 SF

Newport News, VA  
Office 3000 SF  
Warehouse 50,000 SF

Manassas, VA  
Office 5000 SF  
Warehouse 40,000 SF

- o. A description of any other services offered by the National Offeror(s), such as automobile handling, pet handling, movement of plants, expert packing, etc.

Through the use of quality, carefully selected service providers, Mayflower can accommodate any type of service required associated with any relocation.

- p. A description of the National Offeror(s) commitment to the Commonwealth in terms of resources, personnel, investment, etc.

As one of the premier corporate movers in the United States, we represent over 40 percent of the market and proudly serve more corporate businesses than any other van line in America. While our client list includes more than 400 of the distinguished Fortune 500 list of America's largest organizations, all of our customers receive the same customized service that has made us the largest and most respected company in the moving industry. So whether you are large or small customer, the Commonwealth will receive personalized attention and tailored service to meet your needs.

- q. A copy of the National Offeror(s) most recent financial statements.

See exhibit G.

## B.2 INTERSTATE AGENTS

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

Employees: 200  
Annual Sales: \$16,239,282  
Quantity of road equipment: 23 Tractor-trailers  
Location of local agency:

The Kloke Group  
1855 Boulevard West  
Richmond, VA 23230

The Kloke Group  
806 Bluecrab Rd  
Newport News, VA 23606

The Kloke Group  
10904 Carolina Dr  
Manassas, VA 20110

The Kloke Group  
300 Landsdown Rd  
Fredericksburg, VA 22402

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

The Kloke Group is 100% employee-owned (ESOP – Employee Stock Ownership Plan) Virginia Corporation specializing in transportation and storage services. Kloke is committed to being a diversified service provider that consistently exceeds the expectations of our customers and is recognized as an Industry Leader in Safety, Growth and Profitability. Key business segments include residential household relocation for private transferees and corporate employees; complete relocation services for office and industrial clients; transportation of commodities requiring specialized handling; product distribution and document storage. From our facilities in Richmond, Fredericksburg, Newport News and Manassas we can provide full local, national and international service.

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

## Key Personnel List

*Jack Kloke – Board Chairman*

[jkloke@kloke.com](mailto:jkloke@kloke.com)

Jack, along with his wife Beth and two sons, started Kloke Transfer in 1985 and is still actively involved in the daily operations of the business. He left the Naval Academy in mid 1950 and fought in the Korean War as a ranger company commander. After a brief stint as a civilian, he reentered the Army and spent the next twenty-four years as a career soldier, commanding units at company, battalion and brigade level. His service included combat tours in Korea, Lebanon, Baghdad, Laos, Dominican Republic and Vietnam. Following military retirement, his family started a new furniture delivery service in the Metro Washington, DC Area which evolved into the start up mentioned above. Jack led the development of one of the larger office and library moving companies in Virginia. He personally managed many larger projects including Alstom Power (ABB), LandAmerica, Wheat First Securities, Hunton Williams, Media General, Norfolk Southern Railroad Headquarters, Norfolk State University Library, Circuit City Headquarters, the College of William and Mary Library and many others. He has degrees from the University of Maryland (BS), Georgetown University (MA) and is a graduate of the War College.

*Greg Herceg - President and CEO*

[gherceg@kloke.com](mailto:gherceg@kloke.com)

Greg brings over 15 years of business management leadership experience in manufacturing and service environments, focusing on revenue expansion and operational efficiency. Prior to joining Kloke Group, Greg was General Manager of Honeywell's \$85 million Advanced Fibers and Composites division, where he turned an unprofitable division into a business that grew at 20% per year over a six year period and became the most profitable division in Honeywell's \$3 billion Specialty Materials Strategic Business Unit. Prior to joining Honeywell, Greg led the Commercial Credit Analysis group for a Washington, D.C.-based bank to become the youngest manager in the bank's history. Greg holds an MBA from the Colgate Darden Graduate School of Business Administration at the University of Virginia and a BBA in Finance from the College of William and Mary. Additionally, he received his CPA designation in the state of Maryland.

***Kevin Cason - Vice President and GM***

[kcason@kloke.com](mailto:kcason@kloke.com)

Kevin has over 15 years of experience relocating large corporations all of the United States. During his career with both United and Allied Van Lines largest agents, he has served as Project Manager on multi phased interstate relocations for companies such as IBM, General Electric, Microsoft, Coca Cola, UPS, Cingular, Time Warner and Home Depot. Kevin has a keen understanding of what it takes to move hundreds of employees and millions of dollars in assets with minimal down times for the client while staying on budget. Many of these relocations involved moving upward of 1200 employees. Kevin is currently the Vice-President and GM for Kloke Group in Richmond, Virginia an agent for United Van Lines and Mayflower Transit.

***Jim Fitzhugh – Vice President, Sales***

[jfitzhugh@kloke.com](mailto:jfitzhugh@kloke.com)

Jim has over 15 years of experience in the transportation industry with a background in both operations and sales. With over 10 years in management, he has worked with both internal and external customers to create partnerships with corporations of all sizes. Prior to joining the Kloke Group Jim has worked with one of the largest, most reputable freight carriers in the industry. At Overnite Transportation (UPS Freight), he developed and managed a one hundred seat call center that reached sales of over fifty million dollars annually.

***Donna Erickson – National Accounts Relocation Manager***

[derickson@kloke.com](mailto:derickson@kloke.com)

Donna has over 15 years of experience in the industry and over 10 years of experience as move coordinator/national account relocation manager. Presently, Donna is responsible for managing accounts such as Bureau of Prisons, US Marshall Service, Sentara Healthcare Systems, and Boarshead Provisions

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

Donna Erickson  
300 Landsdowne Rd  
Fredericksburg, VA 22402  
866-666-7679 (direct)

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

Although Kloke makes every attempt to pack and load all its corporate accounts it's sometimes necessary to rely on other quality agents within the van line. When this is necessary, we only utilize agents with the highest possible quality ratings. Presently our pack/load percentage is 25%.

Bureau of Prisons  
Susan Pratt  
301-317-5206

US Marshall Service  
Nellie Brito  
202-305-9441

Census Bureau  
Charles Harris  
301-763-7863

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

### **Richmond**

The Richmond agency has over 80,000 square feet of space offering superb access to Interstate 95 and Interstate 64 for full north/south and east/west traffic lanes. This facility is involved in household relocation, office moving, special product transportation, warehousing and distribution, packing and crating as well as overseas/international shipping.

## **Fredericksburg**

Our Fredericksburg facility is involved in household and office relocations, storage, international shipping, and long distance hauling. The 120,000 square foot warehouse is situated on almost 19 acres. This facility is equipped with a 200,000 pound 70 foot in-ground scale.

## **Newport News**

This agency maintains 50,000 square feet of warehouse. Ideally located near active Navy, Air Force and Army bases, this facility engages in household and office relocations, international shipping, packing and crating for both military and civilian organizations.

## **Manassas**

Located in the fast-growing Northern Virginia metropolitan area, this agency provides strategic access to I-66, I-495, I-95 and the District of Columbia. From its 40,000 square feet of warehouse space, this full service facility engages in household and office relocations, international shipping, packing and storage.

## **Corporate Headquarters**

Our Corporate Headquarters is located on Belt Boulevard in Richmond. Located at this facility is a 55,000 square foot warehouse that functions as the central point for most commercial warehousing and distribution activities. Within its 55,000 square feet of warehouse space lays our computerized temperature and humidity-controlled environment that has been a temporary home to some of America and Virginia's most prized historical artifacts.

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

As an agent for one of the premier corporate movers in the United States, we represent over 40 percent of the market and proudly serve more corporate businesses than any other van line in America. While our client list includes more than 400 of the distinguished Fortune 500 list of America's largest organizations, all of our customers receive the same customized service that has made us the largest and most respected company in the moving industry. So whether you are large

or small customer, the Commonwealth will receive personalized attention and tailored service to meet your needs.

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

See exhibit G.

- 6. Describe the National Offeror(s) general experience in providing services of the nature the Commonwealth seeks.

The National Offereor presently retains over 40 percent of the market share and serves more corporate businesses than any other van line in America. Additionally, our client list includes more than 400 of the distinguished Fortune 500 list of America's largest organizations.

- 7. Describe the local agent(s) general experience in providing services of the nature the Commonwealth seeks.

The Kloke Group has proudly served corporate accounts for over 20 years working with both private companies and government agencies at every level. The retention of our corporate accounts speaks to our experience and the commitment we posses towards maintaining and expanding our partnerships.

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

Bureau of Prisons  
Susan Pratt  
301-317-5206  
2 years  
60 shipments

US Marshall Service  
Nellie Brito  
202-305-9441  
30 shipments

Census Bureau  
Charles Harris  
301-763-7863  
10 shipments

9. Provide a list of all clients lost within the last three years which includes:
  - a. A contact name and telephone number
  - b. Length of service at the account
  - c. Reason for the loss

N/A

**B. Financial Proposal**

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

1. Packing/Loading Services
  - Interstate – 62% reduction off of 400N
  - Intrastate – 55% reduction off of VA Tariff
2. Unpacking/Unloading Services
  - Interstate – 62% reduction off of 400N
  - Intrastate – 55% reduction off of VA Tariff
3. Appliance servicing (disconnect, preparation for transport, and reconnect)
  - Interstate – 62% reduction off of 400N
  - Intrastate – 40% reduction off of VA Tariff
4. Extra pickup and deliveries
  - Interstate – 62% reduction off of 400N
  - Intrastate – 40% reduction off of VA Tariff
5. Short term storage or in-transit storage
  - Interstate – 50% reduction off of 400N
  - Intrastate – 40% reduction off of VA Tariff
6. Transportation services
  - Interstate – 62% reduction off of 400N
  - Intrastate – 40% reduction off of VA Tariff
7. Tariff Rates
  - Interstate – 62% reduction off of 400N
  - Intrastate – 40% reduction off of VA Tariff
8. Insurance provided by the Offeror
  - Interstate - \$100,000 full value replacement at no cost  
.40 per \$100.00 of coverage over and above
  - Intrastate – \$3.50 per \$100,000 of coverage

9. Automobile Rates

Interstate – 62% reduction off of 400N

Intrastate – 40% reduction off of VA Tariff