



AllegianceSM

Government Relocation

A Weichert Workforce Mobility Company

GSA Multiple Award Schedule

SIN 531

Employee Relocation Solution

Federal Acquisition Service

Authorized Federal Supply

Schedule Price List



Schedule Title

Multiple Award Schedule

FSC Group

MAS 531- Employee Relocation Solution

Contract Number: 47QMCB18D0003

For more information on ordering from Federal Supply Schedules click FSS Schedules at fss.gsa.gov

Contract Period: December 15, 2017 – December 14, 2022

Franconia Real Estate Services, Inc. d/b/a Allegiance Government Relocation

13580 Groupe Drive, Suite 400

Woodbridge, VA 22192

Telephone: 703-586-9400

Fax: 888-578-6442

www.allegiancerelo.com

Contract Administrator

Timothy A. Bonette

13580 Groupe Drive, Suite 400

Woodbridge, VA 22192

Telephone: 703-586-9406

Fax: 877-436-3475

Email: tim.bonette@allegiancerelo.com

Business Size: Large

DUNS#: 605826197

Customer Information Page

- 1a. MAS 531- Employee Relocation Solution
- 1b. For all pricing questions refer to Contract 47QMCB18D0003 at www.gsaadvantage.com or call Allegiance at 703-586-9400
- 1c. Does not apply to this contract
2. Maximum order: \$1,000,000
3. Minimum order: \$100
4. Geographic coverage (delivery area): Worldwide
5. Point(s) of production (city, county, and state, or foreign country): Woodbridge, VA, 22192
6. Discount from list price or statement of net prices: All prices shown are net, discounted prices to the government
7. Quantity discounts: Contact Allegiance
8. Prompt payment terms: Net 30 days
- 9a. Notification whether Government purchase cards are accepted at or below the micro-purchase threshold: Accepted
- 9b. Notification whether Government purchase cards are accepted or not accepted above the micro-purchase threshold: Accepted
10. Foreign Items: Not Applicable
- 11a. Time of Delivery: Specified in Task Order
- 11b. Expedited Delivery: Not Applicable
- 11c. Overnight and 2-day Delivery: Not Applicable
- 11d. Urgent Requirements: Contact Allegiance
12. F.O.B. point(s): Not Applicable
- 13a. Ordering Address: Timothy A. Bonette
13580 Groupe Drive, Suite 400
Woodbridge, VA 22192
Telephone: 703-586-9406
Fax: 877-436-3475
Email: tim.bonette@allegiancerelo.com

- 13b. Ordering Procedures: Contact Contract Administrator, contact information above
14. Payment Address: 13580 Groupe Drive, Suite 400
Woodbridge, VA 22192
Wire Remittance: Please see Tim Bonette for instructions
15. Warranty Provision: Not Applicable
16. Export packing charges: Not Applicable
17. Terms and conditions of Government purchase card acceptance (any thresholds above micro-purchase level): Not Applicable
18. Terms and conditions of rental, maintenance, and repair: Not Applicable
19. Terms and conditions of installation: Not Applicable
20. Terms and conditions of repair parts: Not Applicable
- 20a. Terms and conditions for any other services: Not Applicable
21. List of services and distribution points: Not Applicable
22. List of participating dealers: Not Applicable
23. Preventative maintenance: Not Applicable
- 24a. Special attributes such as environmental attributes: Not Applicable
- 24b. If applicable, indicate that Section 508 compliance information is available on Electronic and Information Technology (EIT) supplies and services and show where full details can be found: Information is available, please contact Contract Administrator
25. Data Universal Numbering System (DUNS) Number: 605826197
26. Notification regarding registration in Central Contract Registration (CCR) database: Registered and valid until 02/11/2021

Home Sale Services

Pricing Option 1: Full Choice Guaranteed Buyout with Mortgage Payoff

Shall mean that the following elements are in place:

- Employee has the choice of their real estate agent in both the old and new location;
- Employee may have previously marketed the home under a “For Sale by Owner, or through other listing arrangements;
- Appraisals are ordered/performed upon Authorization;

- Employee will select the Designated Certified Appraisers from the list provided by Contractor;
- Employee has up to 60 days to accept an Appraised Value Offer, but period may be increased up to 90 days by the ordering agency;
- Employee may accept the Appraised Value offer at any time during the offer period;
- Mortgage Payoff is required at the time of acquisition;
- Employee mortgage counseling for the new home purchase is not required; and
- Employee has choice of mortgage supplier.

SALE TYPE	Up to \$99,999	\$100,000 - \$499,999	\$500,000 - \$749,999	Over \$750,000
Appraised Value Sale	28.50%	28.00%	28.00%	28.00%
Amended Value Sale	12.35%	12.35%	12.35%	12.35%

Pricing Option 2: Full Choice Guaranteed Buyout without Mortgage Payoff

Shall mean that the following elements are in place:

- Employee has the choice of their real estate agent in both the old and new location;
- Employee may have previously marketed the home under a “For Sale by Owner, or through other listing arrangements;
- Appraisals are ordered/performed upon Authorization;
- Employee will select the Designated Certified Appraisers from the list provided by Contractor;
- Employee has up to 60 days to accept an Appraised Value Offer, but period may be increased up to 90 days by the ordering agency;
- Employee may accept the Appraised Value offer at any time during the offer period;
- Employee mortgage counseling for the new home purchase is not required;
- Employee has choice of mortgage supplier; and
- Mortgage payoff is not required at the time of acquisition; however, the Contractor is required to comply with the provisions outlined under Mortgage Servicing.

SALE TYPE	Up to \$99,999	\$100,000 - \$499,999	\$500,000 - \$749,999	Over \$750,000
Appraised Value Sale	28.00%	27.50%	27.50%	27.50%
Amended Value Sale	12.35%	12.35%	12.35%	12.35%

Pricing Option 3: Managed Guaranteed Buyout with Mortgage Payoff

Shall mean the following elements are in place:

- Employee is REQUIRED to use a Contractor recommended real estate agent in BOTH the old and new location;
- Employee must NOT have listed the home previously with another agent, or as a “For Sale by Owner” within the last six (6) months;
- Appraisals may be delayed for up to 30 days from the date of Authorization;
- Employee will select Designated Certified Appraisers from the list provided by the Contractor;
- Employee list price cannot exceed 105% of the average of two Broker Market Analyses (BMA) or the Appraised Value Offer;
- Mandatory Marketing Period will be a minimum of 60 days prior to acceptance of an Appraised Value Offer;
- Employee has up to 60 days to accept an Appraised Value Offer, but period may be increased up to 90 days by the ordering agency;
- All offers received by the Employee must be presented to the Contractor, with Contractor’s right to accept buyer offers lower than the Appraised Value Offer (in which case, Employee will accept the Contractor’s Appraised Value Offer and the Contractor will acquire the property at the buyer’s lower price);
- Employee mortgage counseling for the new home purchase is required;
- Employee has choice of mortgage supplier; and
- Mortgage Payoff is required at the time of Contractor acquisition into inventory.

SALE TYPE	Up to \$99,999	\$100,000 - \$499,999	\$500,000 - \$749,999	Over \$750,000
Appraised Value Sale	28.00%	27.50%	27.50%	27.50%
Amended Value Sale	11.35%	11.35%	11.35%	11.35%

Pricing Option 4: Managed Guaranteed Buyout without Mortgage Payoff

Shall mean the following elements are in place:

- Employee is REQUIRED to use a Contractor recommended real estate agent in BOTH the old and new location;
- Employee must NOT have listed the home previously with another agent, or as a “For Sale by Owner” within the last six (6) months;
- Appraisals may be delayed for up to 30 days from the date of Authorization;
- Employee will select Designated Certified Appraisers from the list provided by the Contractor;
- Employee list price cannot exceed 105% of the average of two Broker Market Analyses (BMA) or the Appraised Value Offer;

- Mandatory Marketing Period will be a minimum of 60 days prior to acceptance of an Appraised Value Offer;
- Employee has up to 60 days to accept an Appraised Value Offer, but period may be increased up to 90 days by the ordering agency;
- All buyer's offers received by the Employee must be presented to the Contractor, with Contractor's right to accept buyer offers lower than the Appraised Value Offer (in which case, Employee will accept the Contractor's Appraised Value Offer and the Contractor will acquire the property at the buyer's lower price);
- Employee mortgage counseling for the new home purchase is required;
- Employee has choice of mortgage supplier; and
- Mortgage payoff is not required at the time of acquisition; however, the Contractor is required to comply with the provisions outlined under Mortgage Servicing.

SALE TYPE	Up to \$99,999	\$100,000 - \$499,999	\$500,000 - \$749,999	Over \$750,000
Appraised Value Sale	27.50%	27.00%	27.00%	27.00%
Amended Value Sale	11.35%	11.35%	11.35%	11.35%

HOME MARKETING ASSISTANCE

Contractor provides assistance in the marketing of the Employee's home, whether the employee is eligible for any of the Guaranteed Buyout Options or not. Contractor recommends repairs and improvements to the home as well as other marketing recommendations to prepare the property for sale.

Amend-From-Zero Sales: This sale occurs when the relocating Employee receives a Bona Fide Offer from a qualified (outside) buyer *before* receiving the Contractors Appraised Value Offer. It occurs under all pricing options but will be most common under Options 3 and 4.

Key Terms:

- Contractor Assists and advises the Employee during the outside offer negotiations.
- Contractor obtains 2 Broker Market Analyses from 2 separate real estate offices and uses the higher of the 2 as a major factor in determining a reasonable value.
- Once the offer price is determined to be reasonable, Contractor may:
 - Make an Amend-From-Zero Offer to the Employee, equal to the outside offer, OR
 - Elect not to make an Amend-From-Zero Offer.
- The Employee may either:
 - Accept the offer from the outside buyer and Contractor's Home Sale Services would terminate, OR

- Reject the offer from the outside buyer and continue with Home Sale Services.

OTHER SERVICES INCLUDE, AT NO CHARGE:

DESTINATION AREA SERVICES:

- **Renter Assistance** – Contractor provides available housing and community information, rental rates, and referral to a rental specialist. Contractor will review lease documents and advise Employee on other rental matters.
- **Buyer Assistance** - Contractor provides community information and referral to a Relocation Specialist, who is thoroughly familiar with Employee's area of interest and provides available housing that meets the Employee's personal and financial needs.
- **Mortgage Counseling** – Contractor explains the mortgage process, types of loans, home affordability analysis and other mortgage services. If employee requests, Contractor can refer Employee to specialized Relocation Loan Officers with nationwide lenders, for quick mortgage pre-approval and current rate quotes.
- **Spousal Counseling** – Contractor offers relocation counseling, explains the move process, and provides employment resources and general destination area information.

REPORTING & QUALITY ASSURANCE:

Periodic and custom reports created in various formats at the discretion of the ordering agency or activity. Reports are generated from an extensive database of information contained in our technology platform.

Additional Services

Services can be ordered independently of Home Sale and Move Management.

Entitlement counseling – counsels the employee on the agency relocation policy, relocation benefits and employee responsibilities. The counselor provides information on the relocation process, individual relocation plan and “settling-in” assistance.

- \$300 per employee

Closing Assistance – performs as a notarized representative on behalf of the employee at closing. Reviews HUD-1 and ensure all charges are valid and reasonable. Conducts pre-settlement services such as walk-thru inspection and ensures all conditions of contract are met prior to closing.

- \$1,500 per employee

Rental Assistance – assists employee in obtaining rental property at new duty station. Services include ensuring fair market rental price, reviewing and negotiating lease, inspecting property and coordinating movement from temporary housing to leased property.

- No Fee

Rental Management

- Basic: No Fee
- Enhanced: \$450.00 plus agent direct costs

Expense Management (Voucher Tracking/Review/Payment) - professionally managed accounting system that provides complete administration, cost tracking, auditing for FTR and tax compliance, and accurately reporting all expenses related to an employee's relocation. Payment can be made to the employee in advance. The contractor invoices the ordering agency for all reimbursable expenses paid to the employee.

- \$625 per employee for 1st year; \$550 per employee for 2nd, 3rd and 4th years

Cost of Living Analysis – provides a comparison of the cost of living statistics between the old duty station and the new duty station. The information is user friendly and includes housing, salary, taxes and costs of goods and services.

- \$75 per employee

Group Move Assistance – provides departure and destination consulting services, entitlements counseling and review of applicable FTR benefits. One-on-one counseling conducted. Overriding goal is to ensure employees feel they are receiving individual attention.

- \$750 for a group up to 50 employees.
- No charge when this service is combined with Home Sale or Move Management.

International Move Assistance- discusses cross-cultural topics and provides information on destination area, destination assistance, support network, and the unique international move process. One-on-one counseling is conducted.

- \$750 for a group up to 50 employees.
- No charge when this service is combined with Home Sale or Move Management.

Property Management Services:

Prepare a Property Management Agreement with employee; provide rental market

analysis to establish appropriate monthly rent value; coordinate marketing strategy utilizing available methods of advertising, including MLS (multiple listing service) where applicable; assist in prospective tenant application process, including tenant screening, pre-qualification; provide lease procurement and negotiation assistance; administer rent collection process on monthly schedule for tenant occupied properties; establish set monthly expense requirements with employee, which may include mortgage, tax, insurance, utilities, and maintenance payment management; coordinate and dispatch service for requested or required maintenance work orders to the property, including routine or emergency service requests; maintain operating reserve account of employee funds to cover monthly expenses in addition to emergency reserve allowance; validate and process payment of property expenses; coordinate property inspections (site evaluations), including employee move-out, tenant move-in, tenant move-out, employee move-in, and routine (quarterly) tenant occupied or bi-weekly vacant property evaluations; provide monthly employee ledger statements of account including income and expenses for the period; provide year-end account summary, in addition to 1099-MISC preparation for employee tax assistance; coordinate and assist employee with potential tenant lease default, including non-financial coordination of eviction processes where requested; assist employee in employee return procedure, including account reconciliation at conclusion of relocation term.

Employee is responsible for financial costs affiliated with tenant eviction proceedings.

Pricing

Inclusive of the Industrial Funding Fee (IFF).

Property Management Service Type	Unit of Issue	Government Fee
Leasing Fee for Tenant Procurement Services- New Tenant: Calculated as percent of gross rent due for initial lease term	Per Unit	10%
Leasing Fee for Tenant Procurement Services- Lease Renewal: Calculated as percent of one month's rent	Per Unit	50%
Property Management Service Fee: Fee per property per month, includes all property management administration costs	Per Unit	\$370.00

Training- discussions and instructions on federal relocation for employees and other personnel as designated by the ordering agency. Topics include FTR, agency relocation policies, moving and storage, real estate and expense tracking. In addition, useful relocation information and resources are referenced from the Employee Relocation Council (ERC).

- No charge

Agency Customization Services

Buyer Value Option (BVO) – *The BVO information below reflects the most recent changes to the Solicitation. Those changes provide agencies more flexible home sales options, terms and pricing.* It is similar to amended value sale but less costly. Although not a guaranteed purchase based on appraisals, the program allows the property to be marketed by the employee until a bona fide (outside) buyer makes an offer. Once the contract is accepted, Contractor acquires the property from the employee at the offer price and signs the contract with the outside buyer. The transaction is then executed the same as an amended value sale.

Option 1: Full Choice - Mortgage Payoff				
	Up to \$99,999	\$100,000-\$499,999	\$500,000-\$749,999	over \$750,000
BVO - Sale Fall-Through - Rebill	12.00%	11.00%	11.00%	12.00%
BVO-Sale Fall-Through - No Rebill	14.00%	13.00%	13.00%	14.00%
Option 2: Full Choice - No Mortgage Payoff				
	Up to \$99,999	\$100,000-\$499,999	\$500,000-\$749,999	over \$750,000
BVO - Sale Fall-Through - Rebill	12.00%	11.00%	11.00%	12.00%
BVO-Sale Fall-Through - No Rebill	14.00%	13.00%	13.00%	14.00%
Option 3: Managed Buyout - Mortgage Payoff				
	Up to \$99,999	\$100,000-\$499,999	\$500,000-\$749,999	over \$750,000
BVO - Sale Fall-Through - Rebill	11.50%	10.50%	10.50%	11.50%
BVO-Sale Fall-Through - No Rebill	13.50%	12.50%	12.50%	13.50%
Option 4: Managed Buyout - No Mortgage Payoff				
	Up to \$99,999	\$100,000-\$499,999	\$500,000-\$749,999	over \$750,000
BVO - Sale Fall-Through - Rebill	11.50%	10.50%	10.50%	11.50%
BVO-Sale Fall-Through - No Rebill	13.50%	12.50%	12.50%	13.50%

Special Handling Transactions: Shall mean eligible homes otherwise permitted under the FTR but which are determined by the Contractor and the agency to be either especially difficult to sell or where the property value is especially difficult to determine.

Special Handling Pricing – Homes identified as hard to sell.

Option 1: Managed Homesale - Mortgage Payoff				
	Up to \$99,999	\$100,000-\$499,999	\$500,000-\$749,999	over \$750,000
Appraised Value Sale	34.00%	33.00%	33.00%	34.00%
Amended Value Sale	12.85%	12.85%	12.85%	12.85%
Option 2: Managed Homesale - No Mortgage Payoff				
	Up to \$99,999	\$100,000-\$499,999	\$500,000-\$749,999	over \$750,000
Appraised Value Sale	33.00%	32.00%	32.00%	33.00%
Amended Value Sale	12.85%	12.85%	12.85%	12.85%

Temporary Housing - Selection of a temporary housing or extended stay provider from an approved list to meet the temporary needs of lodging.

- No charge for this service

Move Management Services

Alliance will provide, in compliance with Government regulations and procedures, all labor, materials, supervision, and resources to provide management of household goods shipment (domestic and international), boats and mobile home services from initial notification of move through completion of all move-related transactions.

Services available may be procured by the agency in the BPA or task order:

- Entitlement and Pre-Move Counseling
- Transportation Service Provider (TSP) selection
- Ordering TSP services
- Cost Estimates
- Coordination of the Transportation and Storage of Goods
- Quality Control and Service Performance Audit
- Claims Preparation, Filing and Settlement
- Prepayment Audits
- Submission of Invoices to GSA Post Payment Audit Division
- TSP Payment
- Move Management Reports

	Transactions	Fees and Rates
Move Management Fee:	Per Employee Move	\$595- Domestic \$845- International