

Advancing > Lives > Forward

GSA Federal Supply Service
Authorized Schedule Price List
Transportation, Delivery & Relocation Services
Schedule 48

GSA Contract Number: GS-33F-0002W
Effective March 27, 2015

GSA Advantage![®]
www.gsaadvantage.gov



262-523-2800 (P)
262-523-2805 (F)
WWW.WHRG.COM

EMPLOYEE RELOCATION SERVICES

Special Item Numbers Awarded:

653-1 Employee Relocation Services
653-4 Additional Services
653-5 Agency Customization Services
653-7 Move Management Services

WHO WE ARE

WHR Group Inc. (WHR) is a privately owned, client-driven relocation services firm distinguished by its customized technology supporting best-in-class service delivery. Since 1994, we have partnered closely with Human Resources and relocation departments of some of the largest, most demanding and complex global organizations, from Fortune 100 businesses to the U.S. Government. We pride ourselves on a 100% client retention rate for the past decade. WHR has grown its business by helping clients and their employees “advance their lives forward.”

WHR is wholly independent of any affiliation with a real estate company, moving van line, or any other member of the relocation supply chain. This allows WHR to be a truly

performance-driven manager of relocation services. We carefully track objective and subjective performance metrics of all partners. This actively scored and managed relationship with our partners provides above-market value with the highest level of service.

WHR government experience includes a management team with over sixty years’ related experience; a U.S. Department of Defense contract executed in 2009; and a GSA Schedule 48—Transportation, Delivery, and Relocation Solutions (TDRS) award in 2009 under contract #GS33F0002W. GSA conducted a contractor assessment of our GSA contract in January of 2014 and rated our results “Exceptional.”



GENERAL SERVICES

Federal Supply Service Schedule Price List

Online access to WHR Group's price list terms and conditions are available through GSA Advantage at www.gsaadvantage.gov.

Schedule Title and FSC Group, Part and Section:

Transportation, Delivery & Relocation Services
Schedule 48

FSC Class: 48

Contract Number: GS-33F-0002W

Contract Period: October 6, 2009 –
October 5, 2019

**Contractors Name,
Address, Phone
Number:**

WHR Group Inc.
N27W23681 Paul Rd.
Pewaukee, WI 53072
(262) 523-2800 (P)

**Contract
Administrative
Source:**

Paul De Boer
Executive Vice President
WHR Group Inc.
N27W23681 Paul Rd.
Pewaukee, WI 53072
(262) 548-3020 (P)
(262) 523-2805 (F)
paul.deboer@whrg.com

**Contract
Information Source:**

Paul De Boer
(262) 548-3020 (P)
(262) 523-2805 (F)
(708) 280-8824 (M)
paul.deboer@whrg.com

Business Size: Other Than Small

Maximum Order: \$1,000,000

Minimum Order: \$100

Geographic Region: All fifty (50) United States

**Prompt Payment
Terms:** None – Net 30

**Payment by Government
Commercial Credit Card:** No

**Discount for Payment by
Government Commercial
Credit Card:** N/A

**With three (3) five-year
option periods**

Time of Delivery: Per schedule

**Ordering Address
and Points of Production
is the same:**

WHR has one centralized
facility: WHR Group Inc.
N27W23681 Paul Rd.
Pewaukee, WI 53072
(262) 548-3020 (P)
(262) 523-2805 (F)
paul.deboer@whrg.com

Payment Address:

WHR Group Inc.
Attn: Accounting
N27W23681 Paul Rd.
Pewaukee, WI 53072
(262) 523-2800 (P)
(262) 523-2805 (F)

Wire transfers:
Please call for wire
instructions

**Data Universal Number
Systems DUNS Number:** 09-070-6516

**Notification Regarding
Registration in Central
Contract Registration
(CCR) Database:** Registered

**Discount from list prices
or statements of net
prices:**

Prices are net; discounted
prices to the government

SIN 653-1: RELOCATION SERVICE PACKAGE

Proposed pricing is inclusive of the .75% Industrial Funding Fee (IFF) which will be calculated as a percentage of service fees charged to the government.

Appraised Value Sale:

WHR will provide a guaranteed offer to purchase an employee's home after the property is appraised and inspected. The employee will have the option of accepting the guaranteed offer and selling the home directly to WHR. Under the statement of work and agency guidelines, the employee will receive his or her equity based on this guaranteed value. Additionally, the employee will have the option to list and market the property during the offer period in an attempt to better the guaranteed amount.

Amended Value Sale:

Employees may receive an outside offer from a qualified buyer. If this occurs, WHR may purchase the home from the employee based on this offer price. WHR will determine the validity of the offer and, if acceptable, will close the sale with the employee based on the net offer amount. The offer must be presented prior to the employee's acceptance of the guaranteed offer and will result in a lower fee to the agency.

ACQUISITION PRICE RANGE						
PRICING OPTION	HOME SALE PROGRAM TYPE	Up to \$99,000	\$100,000-\$249,999	\$250,000-\$499,999	\$500,000-\$749,999	Over \$750,000
Option 1	Full Choice: Mortgage Payoff					
	<i>Appraised Value Sale</i>	37.5% (\$15,000 min)	36.5%	34.5%	32.5%	34.5%
	<i>Amended Value Sale</i>	14.0% (\$9,000 min)	13.5%	13.0%	12.5%	12.5%
Option 2	Full Choice: No Mortgage Payoff					
	<i>Appraised Value Sale</i>	36.0% (\$15,000 min)	35%	33.0%	31.0%	33.0%
	<i>Amended Value Sale</i>	14.0% (\$9,000 min)	13.5%	13.0%	12.5%	12.5%
Option 3	Managed Buyout: Mortgage Payoff					
	<i>Appraised Value Sale</i>	36.0% (\$15,000 min)	35.0%	33.0%	31.0%	33.0%
	<i>Amended Value Sale</i>	12.5% (\$9,000 min)	12.0%	11.5%	11.0%	11.0%
Option 4	Managed Buyout: No Mortgage Payoff					
	<i>Appraised Value Sale</i>	34.5% (\$15,000 min)	33.5%	31.5%	29.5%	31.5%
	<i>Amended Value Sale</i>	12.5% (\$9,000 min)	12.0%	11.5%	11.0%	11.0%



SIN 653-4: ADDITIONAL SERVICES

Proposed pricing is inclusive of the .75% Industrial Funding Fee (IFF) which will be calculated as a percentage of service fees charged to the government.

Cost of Living Analysis:

Outside consultants report on the cost of living differential between old duty station and new duty station.

Closing Assistance:

WHR will not provide a Guaranteed Buyout, BVO, or marketing assistance. WHR will simply coordinate the closing of an employee's independent home sale transaction.

Expense Management (with or without a W-2):

WHR will coordinate and track employee relocation expenses in conjunction with the ordering agency's relocation program to ensure compliance. In addition, WHR can provide a W-2 per agency requirements if required.

Entitlement Counseling:

WHR will explain to the employee what services he or she is eligible to receive under the agency's relocation program and advocate these benefits on the agency's behalf.

Customized Management Reports:

Customized management reports are provided at no fee.

Agency-Specific Program Materials:

Agency-specific program materials are provided at no fee, but production costs and material costs will be charged back to the ordering agency.

Training and Travel:

WHR will provide transition and implementation training as necessary and requested, and WHR will travel to the agency's location to provide such support.

Property Management:

WHR will provide support to an employee on temporary or permanent assignment inside or outside the United States and who would rather retain and rent their property than sell the home.

Service	Price Offered to the Government
<i>Costing of Living Analysis</i>	\$100 plus any direct cost of report from Data Provider
<i>Closing Assistance</i>	\$750
<i>Expense Management (with or without a W-2)</i>	\$495/homeowner; \$300/renter
<i>Entitlement Counseling</i>	\$300/employee
<i>Customized Management Reports</i>	No fee
<i>Agency Specific Program Materials</i>	No fee; production at cost
<i>Training and Travel</i>	\$500 per WHR employee per day; Travel & Per Diem IAW FTR
<i>Property Management</i>	
<i>Management Fee per Month</i>	\$385
<i>Inspection Fee per Month</i>	\$175
<i>Total Fees per Month</i>	\$560
<i>Broker Commission</i>	12% of annual rent

SIN 653-4: INTERNATIONAL SERVICES

Proposed pricing is inclusive of the .75% Industrial Funding Fee (IFF) which will be calculated as a percentage of service fees charged to the government.

Temporary Living:

Temporary living provides coordination support for the employee in finding temporary accommodations in the new duty station.

Pre-Decision Trip Coordination:

This service provides the employee an opportunity to travel to the new duty station with factual information about the new location. This allows an employee to make a decision on the new location and if it is financially viable.

Immigration and Visa Coordination:

WHR will provide clients with the needed information and assistance to process the applicable country immigration documents and visa applications.

Orientation and Area Tours:

WHR coordinates area orientation tours customized to provide a detailed overview of living in a new country location.

Home Search Assistance:

WHR's home search assistance provides personalized coordination for the employee in searching out a new home in the new country location. This could encompass a rental or purchase dependent, upon the employee's personal desire.

Settling-In Assistance:

This service provides a comprehensive orientation to the new location by offering assistance with city tours, tips on living in the new country, medical and dental care, reliable handyman, utility coordination, introductions to local expat groups, banking assistance, registration, and local insurance practices, etc., allowing for the expat to adjust to the new location.

Local Registration:

WHR will assist the employee with getting registered with the local authorities. Many countries require expats to apply for a residence permit within the local country.

School Search Assistance:

This benefit offers a comprehensive overview of the educational options in a new country for the relocating family, such as evaluations on local schools, which schools match the children's curriculum, organization of placement, arrangement of interviews and tours, and advisement on costs.

Airport Pick Up:

This is a service designed to pick an employee up the first time the employee enters the new location, acting as a personalized guide as the employee is oriented to the new location.



SIN 653-4: INTERNATIONAL SERVICES

Proposed pricing is inclusive of the .75% Industrial Funding Fee (IFF) which will be calculated as a percentage of service fees charged to the government.

Tenancy Management:

WHR will act as the point of contact between the employee and the landlord by providing ongoing tenancy management support and assistance. Services include the track of lease dates, advisement on property market, negotiation of rents and other terms and conditions, assistance with documentation and contracts, and assistance in closing out the lease.

Departure Assistance:

WHR's departure assistance services assists with lease cancellation, closing of utilities, closing of other accounts, arrangement of household goods move, deregistration from local authorities, and any other requirements that need to cease in the expat location.

Property Management:

WHR offers property management support to an employee on temporary or permanent assignment inside or outside the United States, and who would rather retain and rent their property than sell the home.

Bundled Program:

Covers a combination of all of the services and can be customized to the specific needs of the employee.

SERVICE	UNIT OF ISSUE	PROPOSED GOVERNMENT RATE
<i>Temporary Living</i>	Per service	\$350 plus direct costs
<i>Pre-Decision Trip Coordination</i>	Per service	\$750 plus direct costs
<i>Immigration and Visa Coordination</i>	Per service	\$750 plus direct costs
<i>Orientation and Area Tours</i>	Per service	\$350 plus direct costs
<i>Home Search Assistance</i>	Per service	\$350 plus direct costs
<i>Settling in Assistance</i>	Per service	\$350 plus direct costs
<i>Local Registration</i>	Per service	\$350 plus direct costs
<i>School Search</i>	Per service	\$350 plus direct costs
<i>Airport Pickup</i>	Per service	\$350 plus direct costs
<i>Tenancy Management</i>	Per service	Customized pricing
<i>Departure Assistance</i>	Per service	Customized pricing
<i>Bundled Program</i>	Per service	Customized pricing



SIN 653-5: AGENCY CUSTOMIZATION SERVICES

Proposed pricing is inclusive of the .75% Industrial Funding Fee (IFF) which will be calculated as a percentage of service fees charged to the government.

Buyer Value Option:

This is a home sale program similar to SIN 653-1 in that it offers the full benefits of a Guaranteed Buyout, but the guaranteed offer is based on an outside buyer's offer amount. The home is purchased by WHR at the net amount of the outside buyer's offer, and the home is closed with the homeowner based on this value. This is a lower cost option to SIN 653-1 but provides a similar level of benefit to the employee.

ACQUISITION PRICE RANGE						
PRICING OPTION	HOME SALE PROGRAM TYPE	Up to \$99,000	\$100,000-\$249,999	\$250,000-\$499,999	\$500,000-\$749,999	Over \$750,000
Option 1	Full Choice: Mortgage Payoff					
	<i>BVO Sale</i>	13.5% (\$9,000 Min.)	13.0%	12.5%	12.0%	12.0%
Option 2	Full Choice: No Mortgage Payoff					
	<i>BVO Sale</i>	13.5% (\$9,000 min)	13.0%	12.5%	12.0%	12.0%
Option 3	Managed Buyout: Mortgage Payoff					
	<i>BVO Sale</i>	12.0% (\$9,000 Min)	11.5%	11.0%	10.5%	10.5%
Option 4	Managed Buyout: No Mortgage Payoff					
	<i>BVO Sale</i>	12.0% (\$9,000 min)	11.5%	11.0%	10.5%	10.5%



SIN 653-5: AGENCY CUSTOMIZATION SERVICES

Proposed pricing is inclusive of the .75% Industrial Funding Fee (IFF) which will be calculated as a percentage of service fees charged to the government.

Special Handling Home Sale Services:

These fees apply to those properties that are deemed by WHR and the agency to be either especially difficult to sell or where the property value is extremely difficult to establish. Prior agreement between WHR and the agency is necessary before a property would be acquired under these circumstances. The following would be examples of such a property:

- Homes in extremely rural areas with no appraisers located within 50 miles
- Homes in excess of \$1,000,000
- Homes with atypical lot sizes for the area (e.g., 10-acre lot where majority of homes sit on 1 acre or less)
- Homes in foreclosure proceedings
- Homes with environmental issues (e.g., mold, radon, toxic substances, etc.)
- Mobile homes
- Coops in communities where this is not the norm

ACQUISITION PRICE RANGE						
PRICING OPTION	HOME SALE PROGRAM TYPE	Up to \$99,000	\$100,000-\$249,999	\$250,000-\$499,999	\$500,000-\$749,999	Over \$750,000
Managed Buyout: Mortgage Payoff						
Option 1	<i>Special Handling Site</i>	36.0% (plus add'l monthly fee of \$750 until resale closing)	44.75% (plus add'l monthly fee of \$800 until resale closing)	44.75% (plus add'l monthly fee of \$800 until resale closing)	44.75% (plus add'l monthly fee of \$800 until resale closing)	47.75% (plus add'l monthly fee of \$800 until resale closing)
Managed Buyout: No Mortgage Payoff						
Option 2	<i>Special Handling Site</i>	34.5% (plus add'l monthly fee of \$750 until resale closing)	44.5% (plus add'l monthly fee of \$800 until resale closing)	44.5% (plus add'l monthly fee of \$800 until resale closing)	44.5% (plus add'l monthly fee of \$800 until resale closing)	47.5% (plus add'l monthly fee of \$800 until resale closing)



SIN 653-5: AGENCY CUSTOMIZATION PLANS

Destination Services:

WHR will assist employees with all necessary housing needs in the new location, including temporary living, rental assistance, or home purchase assistance.

Mortgage Counseling:

WHR will counsel employees regarding local and nationally available mortgage programs that meet the employee's financial objectives and qualifications.

Sale Closing Services (Closing Assistance Plus™):

WHR's comprehensive closing assistance program, Closing Assistance Plus™, provides agency savings with enhanced employee relocation assistance supporting direct reimbursement and employee self moves. The program provides dedicated counselor support to close the independent sale for the employee, voucher filing assistance of reimbursable costs, agency de-obligation of funds notice, and destination support.

Agency Benefits

- Full access to WHR technology, including status reporting and online document review
- Simple Move Real Estate Referral and Commission Reduction Program
- Cost savings with commission reduction on departure closing with employee participation in Simple Move Real Estate referral program
- Temporary housing savings—employee does not attend closing; moving and settling-in sooner
- De-obligation of funds notice based on actual final closing costs
- Increase efficiency and timeliness of employee voucher process
- Enhanced employee satisfaction

Employee Benefits

- Full access to WHR technology, including mobile app providing status support
- Listing agent assistance; marketing updates; third party offer review
- Employee represented at closing—saving time and resources
- Voucher preparation assistance with documentation
- Destination support for home finding
- SimpleMove™ real estate rebate program at departure and destination—employee receives \$5.00 per \$1,000, no cap, subject to state real estate regulations
- Mortgage and temporary housing referrals

The WHR Relocation Counselor will be the employee's advocate through the relocation process from departure to destination facilitating the coordination of the following services.

Departure Services

- SimpleMove™ commission reduction through agent referral listing program
- Coordinate with the WHR closing network to facilitate required closing paperwork to be sent to the employee
- Coordination with listing agent and WHR closing network for closing requirements
- Represent the employee at the closing through a power of attorney to execute required paperwork
- Review estimated closing settlement statement with employee for approval and review of reimbursable closing costs
- Close the sale for the employee with sales proceeds sent to the employee from the closing agent based on employee instructions
- Prepare and send a sample voucher reimbursement request with supporting closing documentation for the employee
- Advise the authorizing official of final closing costs to ensure timely de-obligation of funds that were obligated for direct reimbursement home sale costs

Destination Services

- New home search support—recommendation of real estate agent based on employee requirements for new home area
- SimpleMove™ rebate program option with rebate to the employee based on the purchase price at \$5.00 per thousand
- Referral to national lenders for no-cost application with enhanced relocation rates and benefits
- Referral to GSA schedule temporary housing agents to assist in locating suitable temporary housing
- Notification to agency of new home closing

Marketing Assistance:

WHR will work with employees to achieve a home sale in the departure location when a BVO or Guaranteed Buyout

is not included in their benefit package. WHR will provide experienced real estate agents, objective pricing recommendations, pre-listing consultations on marketability, and a continuous monitoring of the marketing of the home from listing to closing.

SERVICE	UNIT OF ISSUE	PROPOSED GOVERNMENT RATE
<i>Destination Services</i>	Per service	\$750, but no fee if WHR collects referral fee from destination real estate broker
<i>Mortgage Counseling</i>	Per service	No fee
<i>Sale Closing Services</i>	Per service	\$750
<i>Marketing Assistance</i>	Per service	\$1,250

SIN 653-7: MOVE MANAGEMENT SERVICES

Total household goods move management services, including CHAMP or commercial contract carrier selection according to agency preferences. WHR will provide employees with full move management counseling, monitor the shipment, maintain communication with the employee, verify pick-up and delivery dates, provide performance reporting, and assist with employee claims.

TDRS/CHAMP TEAMING	UNIT OF ISSUE	GOVERNMENT RATE
<i>Move Management Fee</i>	Per employee move	\$350
TARIFF GSA01		
Under this scenario, ordering activities may utilize Tariff WHRG1 outside of the CHAMP Program with an agreement directly between the ordering activity and the schedule vendor	UNIT OF ISSUE	GOVERNMENT RATE
<i>Move Management Fee</i>	Per employee move	\$350
<i>Domestic HHG Line Haul/Accessorial Rate</i>	Per shipment	59.0% off (discount)
<i>Domestic HHG Storage-In-Transit</i>	Per shipment	40.0% off (discount)
<i>Other</i>	N/A	N/A
COMMERCIAL TARIFF		
Under this scenario, ordering activities may utilize carriers Commercial Tariff under the schedule vendor's commercial carrier	UNIT OF ISSUE	GOVERNMENT RATE
<i>Move Management Fee</i>	Per employee move	\$350
<i>Domestic HHG Line Haul/Accessorial Rate</i>	Per shipment	60.0% off (discount)
<i>Domestic HHG Storage-In-Transit</i>	Per shipment	50.0% off (discount)
<i>Other</i>	N/A	N/A
International Shipments		
<i>List price per CWT</i>	Per shipment	Price varies by traffic channel
<i>Other</i>	N/A	N/A