REQUEST FOR PROPOSAL

<table>
<thead>
<tr>
<th>RFP #</th>
<th>18-1006</th>
</tr>
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<tr>
<td>RFP Issued</td>
<td>April 15, 2019</td>
</tr>
<tr>
<td>Title</td>
<td>Relocation Services</td>
</tr>
<tr>
<td>Pre-Bid Conference</td>
<td>N/A</td>
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<tr>
<td>Questions/Clarifications</td>
<td>May 15, 2019</td>
</tr>
<tr>
<td>Bid Due Date</td>
<td>May 31, 2019</td>
</tr>
<tr>
<td>Interviews</td>
<td>As Needed</td>
</tr>
<tr>
<td>Contract Award</td>
<td>June 15, 2019</td>
</tr>
<tr>
<td>Term</td>
<td>2 Base + 3 Option Yrs. (5 Total)</td>
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</tbody>
</table>

Dates are subject to change. All changes will be reflected in Addendum to the RFP which will be posted on the Procurement Services webpage.

RFP Issued by

USD Procurement Services
5998 Alcala Park – PS 116
San Diego, CA 92110
Tel: (619) 260-4782
https://www.sandiego.edu/procurement/
Procurement Contact: Theresa Harris
Email: theresaharris@sandiego.edu
1.0 SECTION 1 – INFORMATION FOR VENDORS

1.1 PURPOSE: The purpose of this Request for Proposal (RFP) is to solicit bid proposals from qualified vendors to provide the University with Relocation Services as outlined in this RFP and attachments. The goal of this RFP is to work towards solutions that will minimize cost, while maintaining or improving current services.

1.2 INTENT: Based on this RFP, USD intends to award a single contract to the responsible Vendor whose bid proposal, conforming to this RFP, is most advantageous to the University, price and other factors considered. USD reserves the right to issue multiple contracts or to separately procure individual requirements that are the subject of the contract during the contract term, when deemed by the University to be in its best interest.

1.3 TERMS: USD’s standard Terms & Conditions (see attachment marked Terms & Conditions) will apply to all contracts or purchase order. These terms are in addition to the terms and conditions set forth in this RFP and should be read in conjunction with them unless the RFP specifically indicates otherwise.

1.4 BACKGROUND: The University of San Diego (USD) is a private Catholic institution of higher education, located on over 180 acres overlooking San Diego's Mission Bay. Charted in 1949, USD enrolls just over 8900 students who may choose from more than 70 undergraduate and graduate degree programs. The student population has approximately 5,774 undergraduate, 2,138 graduate and 933 law students.

The USD campus supports six schools and one college, with over 909 faculty over 2,000 administrative staff and temporary employees. The majority of the University buildings are on the main campus with some residents halls office located off-site.

1.5 SCOPE OF WORK: The University seeks experienced firm(s) to provide relocation services for its newly hired faculty and staff members. As the first “face” of the University that new faculty and staff see, we want to ensure a good impression, exceptional service, and a good value. These moves can be international, throughout the United States, and within the State of California.

Successful Firm(s) will provide all labor and referrals, including supervision, tools, equipment, licenses and incidentals required and/or implied for the complete and satisfactory performance of services at the required locations. In order to achieve this goal, the Selected Firm(s) must provide the following:

1.5.1 A single point of contact for the University.

1.5.2 International, intrastate, interstate, and local transportation of household goods, lab equipment and supplies for employees of the University.

1.5.3 Information regarding packing, moving, and unloading and discarding of all debris at destination.
1.5.4 Binding estimate to the employee prior to final move arrangements. The estimate will be based on actual review of the origin and destination and include all known costs including storage.

1.5.5 Binding estimate will be based on and include the actual review of the origin, storage if required, and final destination and include all known costs. Should any situation arise in which vendor(s) should have taken into account in deriving its binding estimate, any additional costs will be the responsibility of the vendor(s), and will not be passed along to the University.

1.5.6 Assist in arranging supplemental services relating to the movement of household goods such as auto transport, storage, etc.

1.5.7 Offer an effective and comprehensive quality program, including how all members are trained, where the training is conducted and any certifications that are required.

1.5.8 Offer the University employees all services as outlined in the Selected Firm(s)’ estimate and accepted by the employee, including but not limited to: packing, moving, and unloading of household goods and discarding of all debris at destination.

1.5.9 Provide a detailed communication process to be utilized throughout the move. This will include shipment tracking capabilities and technological tools used.

1.5.10 Outline claims handling procedure, including the communications that will take place throughout the process and the escalation method if problems occur that cannot be resolved.

1.5.11 Describe any resources vendor has to advise new USD employees on IRS policies and guidelines pertaining to relocation and relocation services.

1.5.12 Provide Real Estate assistance as needed on a case by case basis.

1.5.13 Refer new University employees to community resources available to them to help with the transition.

1.5.14 Assist with coordination of smaller moves including, but not limited to (PODS) and self-moving vans.

1.5.15 Preference may be given to those that possess a green/sustainability program that helps to manage debris such as boxes and other moving supplies.

1.6 **BASIS OF SELECTION:** Proposals will be evaluated based upon the overall merits and value of the proposal including, but not limited to:
1.6.1 The firm's overall plan and approach to providing the University with the services as described herein;

1.6.2 The firm’s price proposal

1.6.3 The firm’s response which includes experience and references, agreement to terms and conditions and utilization of small businesses.

1.6.4 The firm’s overall approach to sustainability and sustainable practices in carrying out its services

1.5 CONTENT OF PROPOSAL: Proposals will be prepared simply and economically, providing a straightforward, concise description of capabilities to satisfy the requirements of the RFP. Emphasis will be on completeness and clarity of content and will be organized in the order in which the requirements are presented in the RFP.

ALL INTERESTED FIRMS MUST PROVIDE THE FOLLOWING INFORMATION:

1. OPERATIONS
   a. Describe how the firm plans to provide relocation services to the University. Include a description of how the firm will work with the University to provide this service.

   b. Provide a plan of operation to achieve the objectives set forth herein. Include a listing of all steps of service from initial request through invoicing.

   c. Describe the firm’s plan for customer service, including, but not limited to:
      i. Capability of analyzing relocation requests and making recommendations
      ii. Effective procedures for complaint resolution and problem escalation
      iii. Flexible procedures for the placement of orders
      iv. Emergency service to include weekends and holidays
      v. Firm(s) information, Personnel, References

2. NATIONAL FIRM
   a. Describe the national firm and the designated local agency, its size, number of employees, and annual sales. This should include:

   b. Brief history of the National Firm, emphasizing its services to higher education and/or to major nonprofit accounts;
c. An organizational chart indicating which individuals or positions will have knowledge of an agreement with the University and the degree to which each person will be responsible to the University’s account;

d. A copy of the Firm’s Interstate Commerce Commission (ICC) certificate describing the National Firm’s scope of authority;

e. A copy of the National Firm’s current tariff and supplements;

f. A description of the National Firm’s road equipment dispatch system;

g. A description or examples of the National Firm’s and local agent(s)’ driver training and safety programs. Include copies of any service awards, if applicable;

h. A description or examples of the National Firm’s and local agent(s)’ packer training and safety program. Include copies of any service awards, if applicable;

i. Samples of any literature or programs to be provided to University employees and their families to prepare them for relocation;

j. A description of the procedure for estimates including review at origin and destination, verification of completion of all loading and unloading services authorized and verification of completion of all services, include claims, billing, and customer survey;

k. A description and example of the Firm’s claim follow-up and settlement procedure. Include copies of all applicable forms;

l. A description of any other services offered by the National Firm, such as automobile handling, pet handling, movement of plants, expert packing, etc.;

m. A description of the National Firm’s commitment to the University in terms of resources, personnel, investment, etc.; and

3. **LOCAL AGENTS**

a. The number of employees, annual sales, quantity of road equipment, and location of the local agency designated for the University’s account;

b. The name and a brief history of the Firm’s local agency;

c. An organizational chart of the Firm’s local agency;
d. A list of local agents with warehouse facilities;

e. Resumes of the customer service representative who will be directly responsible for the University’s account;

f. A detailed description of the local agent(s)’ present pack and load percentage with three references that can verify this;

g. A description of the warehouse facilities of the designated local agent(s);

h. A description of the local agent(s) commitment to the University in terms of resources, personnel, investment, etc.;

i. Describe the local agent(s)’ general experience in providing services of the nature the University seeks.

4. CLIENTS

a. Provide a list of all the firm’s clients comparable to the University indicating the length of service of each account. Please provide contact names, email addresses, phone numbers, and year 2018 shipment totals tendered to the local agent(s) by these references.

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

5. FINANCIAL PROPOSAL

a. Describe the firm’s financial proposal including, but not limited to, fees for:
   - Packing/Loading services, including small and larger clients
   - Unpacking/Unloading services
   - Appliance servicing (disconnect, preparation for transport, reconnect)
   - Extra pickup and deliveries
   - Short terms storage in the event new housing is not immediately available
   - Transportation services including surcharges
• Tariff Rates
• Insurance Rates
• Real Estate Service, as needed basis
• Any other relevant fees

6. Provide a list of institutions of higher education with which the firm has signed a term contract.

7. Provide the amount of annual sales that the firm has with each institution of higher education

2.0 SECTION 2 - KEY EVENTS

2.1.1 PRE-BID CONFERENCE: N/A

2.1.2 QUESTION AND ANSWER PERIOD: Prospective Vendors are encouraged to submit their questions to the USD procurement team before the deadline. The Question and Answer period will be open through May 15, 2019.

2.1.3 SUBMISSION OF BID PROPOSAL: In order to be considered for award, the bid proposal must be received by the Procurement Services Department before or at the submission deadline indicated on the Cover Sheet. Please submit proposals to:

Procurement Services Department  
5998 Alcala Parkway-PS111  
San Diego, CA 92110  
Ref: RFP#18-1006 Relocation Services

3.0 SECTION 3 - ADDITIONAL INFORMATION

3.1.1 ADDENDA: In the event that it becomes necessary to revise the RFP, such clarification or revision will be by Addendum. All Addenda to this RFP will become part of the RFP and part of any contract awarded as a result of this RFP. Each Addendum will be added, under the RFP or solicitation number, to the Procurement Services website at https://www.sandiego.edu/procurement/bid-opportunity/

3.1.2 Prospective Vendors must acknowledge receipts of all Addenda with each proposal submitted.

3.1.3 VENDOR RESPONSIBILITY: The Vendor assumes sole responsibility for the complete effort required in submitting a bid proposal in response to this RFP. No special consideration will be given after bid closure because of a Vendor’s failure to be knowledgeable as to all of the requirements of the RFP.
3.1.1.4 **COST LIABILITY**: The University assumes no responsibility and bears no liability for costs incurred by a Vendor in the preparation and submittal of a bid proposal in response to this RFP.

4.0 **SECTION 4 – PROPOSAL SUBMISSION**

4.1 Please see Section 2.1.3 for details on submission. Electronic RFP responses may be submitted to Theresa Harris, theresaharris@sandiego.edu

4.1.1 Proposals must clearly show the vendor name and address and – RFP# 18-1006, Relocation Services.

5.0 **SECTION 5 – VENDOR CONDUCT**

5.1.1 During the RFP process (from release of the RFP to final award), Vendor is not permitted to contact any USD staff or faculty regarding this RFP, unless at the request of the USD designated contact on the title page of the RFP or to fulfill pre-existing contractual obligations. Violation of these conditions may constitute immediate disqualification.

6.0 **SECTION 6 - BID PROPOSAL PREPARATION AND SUBMISSION**

6.1.1 **GENERAL**: The Vendor is advised to thoroughly read and follow all instructions contained in this RFP, in preparing and submitting its bid proposal.

6.1.2 **DOCUMENTS TO BE SUBMITTED WITH BID PROPOSAL**: The following must be submitted with all proposals.

6.1.2.1 **COMPANY PROFILE, SIGNATURE PAGE, PRICE SHEET(S), CONTACT INFORMATION, REFERENCES, CERTIFICATE OF INSURANCE, OWNERSHIP DISCLOSURE FORM, CERTIFICATION REGARDING SUSPENSION AND DEBARMENT, SMALL BUSINESS PARTICIPATION, AND CONFLICT OF INTEREST FORM.** The Vendor shall complete and submit all forms as provided in the RFP, including: Signature page, Contact Information, Business References, Disclosure Form, Conflict of Interest Form, and provide proof of insurance as noted.

6.1.2.2 **OWNERSHIP DISCLOSURE FORM**: Vendor shall complete and submit with the proposal the Ownership Disclosure form. See attachment titled Ownership Disclosure.

6.1.2.3 **CONFLICT OF INTEREST FORM**: The Vendor shall complete and submit with the proposal the Conflicts of Interest form. See the attachments titled Conflicts of Interest.
6.1.2.4 **CERTIFICATE OF INSURANCE:** The Vendor is required to submit proof of liability insurance in accordance with the University’s Insurance Requirements. See attachment titled Insurance Requirements.

6.1.2.5 **TERMS AND CONDITIONS:** Any exception to the terms and conditions must be submitted with the proposal. See attachment titled Standard Terms and Conditions

**7.0 SECTION 7 - CONTRACT TERM AND EXTENTION OPTION**

7.1.1 **TERM:** The term of the contract shall be for a period of 5 years consisting of a two-year base period and three (3) one year options for a total of five (5) years. The contract may be extended for additional one year periods, by mutual written consent of the Vendor and the University.

**8.0 SECTION 8 - PROPOSAL EVALUATION**

8.1.1 **PROPOSAL EVALUATION COMMITTEE:** Bid proposals may be evaluated by a committee composed of members of the College Unit/Department responsible for managing the service, the University’s Procurement Department and other employees.

8.1.2 **ORAL PRESENTATION AND/OR CLARIFICATION OF BID PROPOSAL:** A Vendor may be required to give oral presentation to the University concerning its bid proposal. The University may also require a Vendor to submit written responses to questions regarding the bid proposal. The purpose of such communication is to provide an opportunity for the Vendor to clarify its bid. Original bid proposals submitted, however, cannot be supplemented, changed or corrected in any way.

8.1.3 **EVALUATION CRITERIA:** The University may use, but is not limited to, the following evaluation criteria: (A) The Vendor’s general approach and plans in meeting the requirements of the RFP, (B) The Vendors detailed approach and plans to perform the services required, (C) the Vendor’s approach to sustainability and sustainable practices in performance of the contract (D) Small business participation; (E) the Vendor’s documented experience in successfully performing contracts of a similar size and scope, (F) the qualifications and experience of the Vendor’s team, (G) the overall ability of the Vendor to mobilize, undertake and successfully complete the contract and be responsive to the University’s needs and (H) the price quoted and all other related costs to be incurred by the University. **See Section 1.6 – Basis of Selection for this RFP.**

8.1.4 **REJECTION OF PROPOSAL:** The University reserves the right, in its sole discretion, to reject any or all bids, or to accept a proposal in whole or in part, if deemed to be in the best interest of the University to do so.
8.1.5 **NEGOTIATION AND BEST AND FINAL OFFER:** The University may negotiate one or more of the following contractual issues: the technical services offered, the terms and conditions and/or the price of a proposed contract award with any Vendor, and/or solicit a best and final offer (BAFO) from one or more of the Vendors.

8.1.6 After receipt of the results of the negotiation and/or BAFO, the University will complete its evaluation and issue an award to the responsible Vendor(s) whose bid proposal, conforming to this RFP, is most advantageous to the University, price and other factored considered.

8.1.7 **CONTRACT AWARD:** The University reserves the right to award contracts as a result of this RFP to more than one Vendor.
9. SIGNATURE PAGE

UNIVERSITY OF SAN DIEGO REQUEST FOR PROPOSAL BID RESPONSE

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<tr>
<th>RFP No. 18-1006</th>
<th>DESCRIPTION: Relocation Services</th>
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<tbody>
<tr>
<td>This bid proposal MUST be received by the University before or at 5PM on <strong>May 31, 2019</strong>. Any proposal arriving at the Procurement Department after this submission due date and time will not be accepted.</td>
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Read the entire Request for Proposal, including all terms, conditions and attachments. Documentation below marked with an X must be submitted:

<table>
<thead>
<tr>
<th>Document</th>
<th>With RFP Submission</th>
<th>Document</th>
<th>With RFP Submission</th>
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<tr>
<td>All Price Sheet</td>
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<td>Ownership Disclosure Form</td>
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<td>Vendor Contact Information</td>
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<td>Conflict of Interest</td>
<td>X</td>
</tr>
<tr>
<td>Vendor Business References</td>
<td>X</td>
<td>Proof of Insurance</td>
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<tr>
<td>Small Business Form</td>
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<td>Other</td>
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INFORMATION TO BE COMPLETED BY VENDOR

<table>
<thead>
<tr>
<th>1. Company Name:</th>
<th>2. Phone Number:</th>
<th>3. Contact Name:</th>
<th>4. Contact Email:</th>
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<tr>
<th>5. Company Address:</th>
<th>6. Tax ID No:</th>
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**Proposed Price**  
$______________  

*(Attach updated price list as necessary)*

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<tr>
<th>7. SIGNATURE OF VENDOR</th>
<th>8. TITLE</th>
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<th>9. NAME (Print)</th>
<th>10. DATE</th>
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10. PRICE SHEET

RFP # 18-1006 Relocation Services

PRICING

In completing and submitting this form, the respondents is certifying that:

1. He/she has read and fully understands and accepts the scope of services, the terms and conditions, this price sheet or cost submission form, and the other requirements presented in the Relocation Services Request for Proposal (RFP) # 18-1006
2. The quoted equipment price and labor rates will be used for the base year of the contract. Please attach pricing for any optional year(s). The prices and rates indicated constitute the fully burdened rates for the identified products and services, and USD will not be “surprised” with additional or unanticipated charges in conjunction therewith; and
3. USD reserves the right to accept or reject any and all quotes, to waive any irregularities or informalities in any quotes received, to negotiate with the respondent(s) whose quote(s) is deemed most susceptible of contract award, and to award a purchase contract to the respondent(s) whose quote best satisfies USD’s requirements and needs.
4. The contract will be valid for 1 two-year base period and 3 one-year options for a total of five (5) years and the vendor must state if vendor will allow USD to renew each option upon contract expiration. Each annual contract renewal must be agreed upon by both parties.
5. The pricing, terms and conditions stated in your response must remain valid for a period of (90) days from the date of delivery of the proposal to the University.

The pricings identified in the price/rate sheet(s) will not change for the duration of the contract or any renewal years and no additional charges or surcharges of any kind will be added, unless required by law.

COMPANY NAME ____________________________________________

REPRESENTATIVE SIGNATURE ________________________________

PRINT NAME ___________________________ DATE ______________
# Price Proposal

**10. COMPANY NAME:**

**SIGNATURE:**

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**Relocation Services RFP #**

**18-1006**

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**Total Annual Cost**

$
11. INCENTIVES

Vendor should specify any additional services or incentives that will be offered to the University and included in the quoted price. Any incentives must be identified in the response package. The University cannot accept any incentives that are offered post bid.

COMPANY NAME ___________________________________________________

REPRESENTATIVE SIGNATURE _________________________________________
12. VENDOR CONTACT INFORMATION

Vendor’s Company Name: ___________________________________________________

Company Owner: ________________________________________________________

Address: ________________________________________________________________

Disclosure of Ownership: (List below the names of all Principals or Joint Owners. Use additional sheet as necessary.)

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<thead>
<tr>
<th>Name</th>
<th>Position With Company</th>
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Please indicate any classification that applies to the company below (select all that apply):

<table>
<thead>
<tr>
<th>Classification</th>
<th>Indicate with “X” if Applicable</th>
<th>Classification</th>
<th>Indicate with “X” if Applicable</th>
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<tbody>
<tr>
<td>Small Business</td>
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<td>Woman-Owned Business</td>
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<tr>
<td>Small Emerging Business Enterprise</td>
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<td>Minority-Owned Business</td>
<td></td>
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<tr>
<td>Small Locally-Owned Business (SLBE)</td>
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<td>HubZone</td>
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<tr>
<td>Veteran-Owned Business</td>
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<td>Other (Please state Classification)</td>
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Number of Years firm has been furnishing services: __________

ACCOUNT MANAGER ____________________________________________

TELEPHONE NUMBER ____________________________

EMERGENCY NUMBER ____________________________

EMAIL ____________________________________________

OTHER CONTACT ____________________________________________
13. VENDOR BUSINESS REFERENCES

Please provide three (3) business references for contracts awarded of similar size and scope to the requirements of this RFP:

Reference 1.
Business Name: ________________________________________________

Address: _______________________________________________________

Phone: ______________________ Fax: ___________________ E-mail: __________

Contact Person: _______________ Title: ____________________________

Number of years agreement in place: ______________________________

Reference 2.
Business Name: ________________________________________________

Address: _______________________________________________________

Phone: ______________________ Fax: ___________________ E-mail: __________

Contact Person: _______________ Title: ____________________________

Number of years agreement in place: ______________________________

Reference 3.
Business Name: ________________________________________________

Address: _______________________________________________________

Phone: ______________________ Fax: ___________________ E-mail: __________

Contact Person: _______________ Title: ____________________________

Number of years agreement in place: ______________________________

COMPANY NAME ____________________________________________

REPRESENTATIVE SIGNATURE ____________________________________

16
14. SMALL BUSINESS UTILIZATION FORM

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<th>RFP #</th>
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Small Business Participation

<table>
<thead>
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</table>

I hereby certify that I have made a diligent effort to ascertain the facts with regard to the representation made herein. In making this certification, I certify under penalty of perjury that this information is accurate and correct to the best of my knowledge.

______________________  ____________________
Signature                  Date

______________________  ____________________
Print Name                  Date
15. CONFLICT OF INTEREST

The University of San Diego (USD) has established procedures for reviewing and addressing conflicts of interest between USD employees and suppliers and otherwise ensuring compliance with the University’s Conflict of Interest Policies.

As part of this process, you, the Supplier, are asked to disclose any and all potential conflicts of interest to USD for appropriate review and disposition. Examples include, without limitation, a USD employee having an ownership interest in your business, your business being owned by a relative of a USD employee, and your business sponsoring speaking engagements or other activities with which USD faculty or staff are involved.

Your failure to complete and return this disclosure form may result in a delay of payment, the termination of your contract and/or suspension of your status as a responsive and responsible provider of goods or services to USD.

Your obligation with regard to the disclosure of conflicts of interest is ongoing, therefore we ask that you promptly notify us should you become aware of any potential conflict following the submission of this form. At USD’s discretion you may be asked to update this information periodically.

Supplier Name: _______________________________
Contact Name: ________________________________
Street Address: ________________________________
Phone No.: ___________________________________
City, State, Zip: _______________________________
Email: ______________________________________

Please select the appropriate statement:

____ I AM NOT aware of any relationship between the Supplier and a USD employee which could result in potential personal gain for the USD employee or which could enable the USD employee to influence the Supplier relationship for perceived personal gain.

____ I AM aware of a relationship between the Supplier and a USD employee which could result in potential personal gain for the USD employee or which could enable the USD employee to influence the Supplier relationship for perceived personal gain.

Employee Name: _________________________________________________________
Nature of Relationship: ____________________________________________________

By signing below, you represent and affirm that you have proper authority to act on behalf of the Supplier and that the foregoing statements are true and correct to the best of your knowledge.

___________________________________________________ _______________________
Signature Date

Printed Name and Title of Signer

For USD Procurement Use Only

USD Vendor ID #: __________________
Disposition of disclosed potential conflict of interest: ____________________________________________________________

__________________________________________________________

Reviewed by: Date: ___________________________
16. SUSPENSION AND DEBARMENT

(1) Vendor certifies to the best of its knowledge and belief that it and its principals:

a) Are not presently debarred, suspended, proposed for disbarment, declared ineligible, or voluntarily excluded from doing work under Federal, State or local government award.

b) Have not within a three-year period preceding this application been convicted of or had a civil judgement rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State, or local) transaction or contract under a public transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;

c) Are not presently indicted for or otherwise criminally or civilly charged by a government entity (Federal, State or local) with commission of any of the offenses enumerated in paragraph (1)(b) of this certification; and

d) Have not within a three-year period preceding this certification had one or more contracts terminated for cause or default.

(2) Where the Vendor is unable to certify to any of the statements in this certification, such vendor shall attach an explanation to this certificate.

Business Name: _______________________________________

Date: _________________ By: _____________________________________

Name & Title of Authorized Representative

________________________________________

Signature of Authorized Representative