

Household Goods Moving Services – PROCESS and EXCLUSIVE PROVIDER CONTACTS (Local Agents)

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EXCLUSIVE PROVIDERS are **mandatory sources** for Household Goods Moving Services for all SMU campuses in compliance with SMU Policy 4.8. **Household Goods Moving Services** pertains to moving personal property, vehicles, and lab equipment.

SMU Exclusive Movers are full service **LOCAL AGENTS** for National Carriers that have national and international local agent offices. Exclusive Local Agents are independent companies that coordinate the move directly with the Origin Agent. The Origin Agent will conduct an in-home inventory survey to determine approximate weight of items that will be moved and provide an estimate. ***A 'physical' survey is more accurate than 'virtual' surveys HOWEVER, virtual surveys are recommended during the current COVID-19 pandemic until government restrictions are lifted.***

According to the 2017 Tax Reform Act, **all relocation expenses are taxable income whether SMU pays on behalf of the employee or reimburses the employee. SMU is required to report all moving expenses as taxable income and the paid expenses are subject to appropriate withholding taxes.**

The **Moving Expense Verification and Reimbursement Form** is required for on all relocation moves, and used for tax reporting purposes and reimbursement of **out-of-pocket moving expenses** such as airfare and hotel charges. Obtain the Moving Expense Verification and Reimbursement Form using this [link](#) to the Tax Compliance Office webpage.

1 ----- EXCLUSIVE MOVER PROCESS - SMU LOCAL AGENTS -----

<u>SMU LOCAL AGENTS</u>	<u>RESPECTIVE NATIONAL CARRIER</u>
A1 Freeman Moving Group	North American
Armstrong Relocation	United Van Lines
Berger Transfer & Storage	Allied Van Lines
Daryl Flood Relocation & Logistics	Mayflower

SMU utilizes contracts through E&I Cooperative Services for moving and relocation services.

CONTRACT BENEFITS: 1) Through the E&I contract, SMU receives pricing discounts and maximum liability coverage for loss or damage to items in a shipment at no additional cost. Maximum liability coverage paid is \$6 to \$7 per pound multiplied by the weight of the shipment up to a maximum of \$120,000 to \$125,000. Purchase of additional coverage is available from the moving company. 2) Purchasing can intervene with the mover on employee's behalf.

Employee Responsibility

1. Contact SMU LOCAL AGENTS for household goods, vehicle and lab equipment moves.
*****DO NOT contact the National Carrier or another agent of the National Carrier*****
2. Obtain estimates from one to four of the SMU LOCAL AGENTS based on department requirements.
3. Email estimates to the department contact and state which moving company is preferred.
4. **Estimates are non-binding estimates and not considered a bid, contract or guaranteed price.**
5. **Final moving charges are figured on ACTUAL weight of items moved, mileage and services performed.**
6. Communicate, schedule/book move, and report damage or loss directly with the SMU Local Agent.
7. After completion of move, submit the required **Moving Expense Verification and Reimbursement Form** to the department contact. Reimbursement approval is in accordance with the move allowance agreement. The streamlined reimbursement process for moving expenses allows for quick payment.

Department Responsibility

1. Provide employee relocation Instruction Packet documents with LOCAL AGENT contact information.
2. Determine and communicate the moving allowance for employee's relocation.
3. Enter an eProcurement Requisition to the SMU LOCAL AGENT selected whether SMU is paying for ALL or a PORTION of relocation expenses. Purchasing will send the Purchase Order (PO) to the moving company.

4. PURCHASE ORDER REQUIREMENTS:

- a) When SMU pays for **ALL** of the household goods moving expense the PO should be set for the full estimate total.
- b) When SMU pays a **SPECIFIED AMOUNT (moving allowance)** toward the household goods moving expense the PO must be set for the moving allowance. The moving company will bill SMU for the PO amount (moving allowance) and bill the employee separately for the remaining actual expense.
*****NOTE: The moving allowance paid by SMU is taxable income to the employee.**

c) **A SMU credit card CANNOT BE USED to pay for the household goods moving company expenses.**

5. Notify employee how payment will be handled.

2 ----- **NON-EXCLUSIVE MOVER REQUIREMENTS & PROCESS** -----

*SMU does not have contract agreements with non-exclusive movers. Employee must negotiate pricing and liability coverage with the non-exclusive moving company. **Non-exclusive moving contracts/agreements are between the employee and moving company. SMU Purchasing cannot intervene on employee's behalf.***

*The University reimburses for moving expenses up to the agreed upon moving allowance. Submit Reimbursement Requests with an invoice from the moving company. Alternatively, you may choose to receive the moving allowance as a lump sum amount in your first paycheck. **SMU reports all relocation expenses as taxable income whether SMU pays on behalf of the employee or reimburses the employee. The paid expenses are subject to appropriate withholding taxes.***

Employee Responsibility

1. **Obtain THREE (3) estimates:** one from non-exclusive mover and two from exclusive movers. Estimates must be based on the same inventory and approximate weight and be an apple-to-apple comparison.
2. Email estimates to the department contact and state which moving company is preferred.
3. **Moves contracted with non-exclusive moving companies must be paid with personal funds. A SMU CREDIT CARD CANNOT BE USED.**
4. Communicate, schedule/book move, and report damage or loss directly with the selected mover.
5. After completion of move, submit the required **Moving Expense Verification and Reimbursement Form** to the department contact. Reimbursement approval is in accordance with the move allowance agreement. The streamlined reimbursement process for moving expenses allows for quick payment.

Department Responsibility

1. Provide employee with relocation instructions and SMU LOCAL AGENT contact information.
2. Determine and communicate the moving allowance for employee's relocation.

3 ----- **EXCLUSIVE MOVER – LOCAL AGENT SERVICES** -----

Standard Services include:

Household moving
International moving
Top-rated drivers
Packing, custom crating and unpacking
Valuation Coverage/Insurance
Vehicle transportation

Additional Services may include:

Lab relocation, frozen specimens & sensitive equipment
Data center & technical equipment moving
Office, library, and collection moves
On-site storage solutions

*****SMU recommends storing goods at the destination facility and not at the origin facility. Goods stored at origin will take longer for redelivery. *****

4 ----- **EXCLUSIVE MOVER – LOCAL AGENT CONTACT INFORMATION** -----

A-1 Freeman Moving Group - North American Agent * SMU Supplier ID # 21097**

2242 Manana Drive
Dallas, Texas 75220
www.a-1freeman.com

Primary Contact: Mireya Ducot

Email: eandi@a-1freeman.com
775-373-3626 – E&I direct line

Alternate Contact: Jonathan Hightower
972-556-1777 – direct

Armstrong Relocation - United Van Lines Agent * SMU Supplier ID # 37**

1405 Crescent Drive
Carrollton, Texas 75006
<http://dallas.armstrongrelocation.com>

Primary Contact: Ken Williams

972-389-5679 – direct
800-283-0511 – toll free
kwilliams@GoArmstrong.com

Alternate Contact: Michael Gonzales
972-389-5650 – direct
MGonzales@GoArmstrong.com

Berger Transfer & Storage - Allied Van Lines Agent * SMU Supplier ID # 722**

14850 Grand River Road
Fort Worth, Texas 75220
<https://www.bergerallied.com/>

Primary Contact: Mark McIntyre

MarkM@bergerallied.com
214-802-5207 – cell
800-678-3980 – toll free

Move Coordinator: Rosalyn Washington

rosalynw@bergerallied.com
817-799-3013 – direct
817-768-2441 – fax
800-678-3980 ext. 31-3013

Remit to Address
NW 7215 PO Box 1450
Minneapolis, MN 55485

Corporate Address ***purchase order address
2950 Long Lake Rd.
Roseville MN 55113

Daryl Flood Relocation & Logistics - Mayflower Agent * SMU Supplier ID # 3013**

450 Airline Drive
Coppell, TX 75019
www.DarylFlood.com

Primary Contact: Yana Skeete

713-937-2909 – direct
800-325-9340 ext. 2909
yskeete@darylflood.com

Alternate Contact: Kirk Parrish
972-745-9582 – direct
kparrish@darylflood.com