

Township of West Orange

Revaluation Proposal Evaluation & Recommendation Report

In accordance with N.J.S.A. 40A:11-4.5 this report shall clearly set forth the reasons why Appraisal Systems, Inc. was recommended to perform the complete revaluation of the Township of West Orange. All proposals were thoroughly reviewed by the Evaluation Committee which consisted of the following individuals: Joseph Antonucci, Tax Collector; Edward J. Coleman, Comptroller; Anne DeSantis, Purchasing Agent; Kevin Dillon, Tax Assessor and John Sayers, Business Administrator.

The potential vendors who submitted proposal are as follows:

1. Appraisal Systems, Inc. – proposal amount was \$1,143,400.00
2. Certified Valuations, Inc. – proposal amount was \$1,074,130.00
3. Realty Appraisal Company – proposal amount was \$985,000.00

Proposal Summaries (listed in order of evaluation)

Appraisal Systems, Inc.:

- All Mandatory Proposal Check List items were submitted with their proposal.
- Under Technical Criteria, the evaluation committee scored this company with the highest ranking. The basis for this was Appraisal Systems proposal was the most comprehensive, their experience utilizing Vital's CAMA system was greatest among the competing companies and they appeared to be the most innovative with respect to usage of technology and techniques.
- Under Management Criteria, the consensus among the evaluation committee was that Appraisal Systems possessed the best overall ability to manage the West Orange revaluation given having the greatest number of experienced field inspectors, Certified Tax Assessors (CTA's), transparent public relations program via operating an interactive website to disseminate the greatest amount of critical information to the taxpaying public and possessing a comprehensive history, level of experience and reliability in completing revaluations similar in demographics to the Township of West Orange.
- Under Cost Criteria, the evaluation committee ranks their cost of services lowest among the three respondents, but ranks them the highest in the categories of assurances of performance and vendor's financial stability and strength. As a result, Appraisal Systems ranked second among the three companies in Cost Criteria.

Realty Appraisal Company:

- All Mandatory Proposal Check List items were submitted with their proposal.
- Under Technical Criteria, the evaluation committee ranked this company last among the three vendors. Their proposal indicated they would load the township's Mod-IV data into their Altos System. The township's specifications clearly indicate that the revaluation

shall be done on the Vital CAMA system without exception and no conversation of data is permitted. In addition, this proposal appeared weakest with respect to innovative technology & techniques.

- Under Management Criteria, the evaluation committee noted that Realty Appraisal's preponderance of work was done in Monmouth County with the exception of Glen Ridge which is substantially smaller than the Township of West Orange. In addition, its web site was very basic and lacked PDF images of neighborhood maps, neighborhood sales listing and the interactive ability to calculate a property owner's tax impact resulting from the revaluation. Lastly, the field inspection supervisor failed to have the required 10 years experience (joined Realty Appraisal in 2005) that any supervisor is required to possess in accordance with the township's bid specifications. Moreover, its proposal indicated they have four (4) ongoing revaluations and employ a total of 12 field inspectors. The township's bid specifications require 10 field inspectors with a minimum of six (6) months experience. Consequently, the evaluation committee became concerned that Realty Appraisal had an inadequate number of experienced field inspectors to meet the township's requirement of 10 experienced field inspectors.
- Under Cost Criteria, Realty Appraisal ranked first in cost of services and assurances of performance. This proposal ranked second in vendor's financial stability & strength.

Certified Valuations, Inc.

- All Mandatory Proposal Check List items were submitted with their proposal.
- Under Technical Criteria, Certified Valuation's proposal was second when compared to the other two companies. The evaluation committee was most concerned that a detailed project work schedule was not included in the proposal. Rather, Certified stated, "scheduling of the various parts of the program will be completed with the assessor during the 30 day period after the contract is approved by the Director of the Division of Taxation." Given the tight time constraints to timely complete the revaluation this was troubling. In addition, based upon the proposal submitted Certified appeared to have less experience in both utilizing Vital's CAMA then Appraisal Systems and in utilizing innovative technology & techniques.
- Under Management Criteria, Certified Valuations scored lowest among the three respondents. The evaluation committee, as previously mentioned noted that no detailed project work schedule was submitted with the proposal. Importantly, the evaluation committee was most concerned that Certified Valuation only listed seven (7) field inspectors in one area of their proposal (section 7, page 3) and eight (8) field inspectors on his organizational chart in another area of the proposal. In either case it is apparent that Certified lacks the required number of field inspectors as required by the township's bid specifications.
- Under Cost Criteria, Certified Valuations ranked last. The evaluation committee ranked their cost of services second. Their assurances of performance ranked even with the other two companies. With respect to vendor's financial stability & strength the evaluation committee ranked Certified Valuations last noting the precipitous drop in sales revenue from 2007 to 2008.

Summary

On balance the evaluation committee ranked the three companies proposals as follows (0% to 100%, 100% being the highest & best ranking):

1. Appraisal Systems, Inc. – overall ranking 95.40%
2. Realty Appraisal Company – overall ranking 82.11%
3. Certified Valuations, Inc. – overall ranking 75.86%

Therefore in accordance with N.J.S.A. 40A:11-4.1 et. seq. the evaluation committee hereby recommends Appraisal Systems, Inc. be awarded the revaluation contract by the Mayor & Council.

Dated: February 3, 2010

Revaluation Proposal Evaluation

Evaluated by:

Joseph Antonucci, Tax Collector
Edward J. Coleman, Comptroller
Anne DeSantis, Purchasing Agent
Kevin Dillon, Tax Assessor
John Sayers, Business Administrator

	Realty Appraisal		Certified Valuations		Appraisal Systems	
Proposal Amount	\$985,000.00		\$1,074,130.00		\$1,143,400.00	
	YES	NO	YES	NO	YES	NO
Mandatory Proposal Check List:						
Certificate/Consent of Surety form	X		X		X	
Non-collusion affidavit	X		X		X	
Affirmative Action Forms	X		X		X	
Mandatory EEO Notice	X		X		X	
Statement of corporate ownership	X		X		X	
Statement of vendor's qualifications	X		X		X	
List of current reval projects & the average class 2 assessed value	X		X		X	
List of reval proposals submitted in last 6 months	X		X		X	
Copies of Financial Statements	X		X		X	
NJ Business Registration Certificate	X		X		X	
Professional Services Entity Form	X		X		X	
"Pay-to-Play" Current Annual Disclosure Statement	X		X		X	
Detailed project work schedule	X			X	X	
Statement of litigation history	X		X		X	

Were Exceptions taken?		X		X		X
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Technical Criteria: 40%

	% Weight	% Weight	% Weight
Understands scope & related obj.	10	10	10
Experience utilizing Vital CAMA System	4	7	10
Completeness & responsiveness of proposal requirements	10	7	10
Documentation of past performance	10	10	10
Innovative technology & techniques	5	7	10
Description of PR program	10	10	10
Informal taxpayer hearing process	10	10	10

Total Technical Criteria Weight:	33.71%	34.86%	40.00%
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Management Criteria: 30%

Project management plan	5	0	10
History, Experience & Reliability	7	8	9
Review of Company's Web Site (Interactive?)	5	7	10
Facilities, Equipment, Technology	10	10	10
Personnel (qualifications, quantity available)	7	5	10

Total Management Criteria Weight:	20.40%	18.00%	29.40%
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Cost Criteria: 30%

Cost of Services	10	8	8
Assurances of performance	10	10	10
Vendor's financial stability & strength	8	5	10

Total Cost Criteria Weight	28.00%	23.00%	26.00%
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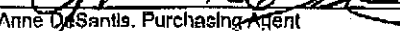
Total Weight all Categories	82.11%	75.86%	95.40%
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Anne DeSantis, Purchasing Agent

Date: February 3, 2010

X = Meets Criteria

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