



PROPOSAL REPORT COVER PAGE



Karen Ehrlich

Association Services of Florida

RFP#: 183588

RFP Title: 2012 Reserve Study UPDATE

Oakridge Property Owners Association

ABOUT THIS REPORT

Please review the following Proposal Report in its entirety. Once reviewed, please log into your free, online manager account and report your community's position on the matter within 15 days of close. Reporting the status or outcome of an RFP will instantly give all vendors, who worked diligently in providing a free estimate, the proper notification of where they stand.

CLEANING UP THE MESS

This proposal report utilizes a patent-pending process to **centralize** all related bids for a more **consistent** format. The end result is less paperwork to manage and less time spent on making an informed decision.

PROTECTING THE COMMUNITY

Each and every vendor who submitted a quote for this RFP has met, or exceeded your predetermined **minimum requirements** for liability insurance, worker's compensation, & licensing. Supporting documents (insurance policies, licenses, etc.) are provided in the proposal packet as part of this sealed bidding process. In addition, every vendor within this report has an "**apple rating**" that is based on the quality of their work and customer service with other communities. This should reduce the likelihood of hiring a "fly by night" contractor that may leave a project unfinished, completed poorly, and/or without warranty.

UNDERSTANDING A VENDOR'S PRICE

Vendor pricing can vary greatly, even when compared "**apples-to-apples**." Some of the many reasons for varying quotes include acquisition fees, insurances, employee benefits, sales commissions, warranties, capital equipment, quality of workforce and materials, experience of estimators, and profit margin. By having multiple bids through a competitive, sealed bidding process, you have a better chance of a lower cost.

STAYING ORGANIZED

Any information received through this software system will be saved for future reference and use. This includes pictures, proposals, scopes of work, and any other documents related to a proposal request. All can be retrieved by simply logging into your free online manager account.







THIS IS NOT A SEALED BID. ALL PRICES WERE VISIBLE UPON BID SUBMISSION FROM VENDORS.

2012 Reserve Study UPDATE
Oakridge Property Owners Association | RFP #183588




Industry Solicited: **Reserve Studies, Appraisals**
 Service Location: **Common areas**

Closed On: **11-28-2011**
 Proposals Submitted: **0**
 Alt.Proposals Submitted: **0**

High Bid: **\$0.00**
 Low Bid : **\$0.00**
 Average Bid : **\$3,141.50**

DESCRIPTION	VENDOR 1	VENDOR 2	VENDOR 3
			
Company Name:	Swaysland Professional Engineering Consultants, Inc.	Association Reserves	ALLIED BUILDING INSPECTION SERVICES, INC.
Vendor Apple Rating: (Based on customer surveys & vendor follow through)	 4 Out of 5	 5 Out of 5	 4 Out of 5
Vendor Address:	2890 Marina Mile Boulevard, Fort Lauderdale, Florida 33312	80 SW 8th Street, Miami (Offices also in Orlando), Florida 33130	8203 SW 124 STREET, MIAMI, Florida 33157
Contact Name:	Stanley Swaysland	Will Simons	JOHN MICALI
Office Number:	(954) 473-0043	(800) 403-9011	(305) 234-7377
Alt.Number:	N/A	(305) 619-9544	(305) 234-7377
Mobile Number:	(954) 398-4997	N/A	(786) 251-8931
Email Address:	sswaysland@ specengineering.net	wsimons@reservestudy.com	John@ InspectionsFlorida.com
Business Established:	1990	1986	1993
General Liability:	\$2,000,000	\$2,000,000	\$1,000,000
Workers Comp. Policy?	Yes	Yes	No
In-House Vendor? (Vendor affiliated with management company)	No	No	No
TOTAL AMOUNT PROPOSED:	\$7,155.00	\$1,090.00	\$2,250.00
Alternate Proposal?	No	No	No

ITEMIZED PRICING BREAKDOWN

DESCRIPTION	VENDOR1	VENDOR2	VENDOR3
			
Company Name:	Swaysland Professional Engineering Consultants, Inc.	Association Reserves	ALLIED BUILDING INSPECTION SERVICES, INC.
Line Item #1 Pricing: 2012 Reserve Study UPDATE	Included In Total Price	Included In Total Price	Included In Total Price
Line Item #2 Pricing: Structures and Elements Maintained by Association	\$7,155.00	\$0.00	\$0.00
Line Item #3 Pricing: Type of Reserve study	\$0.00	\$0.00	\$0.00
Line Item #4 Pricing: Service Level	\$0.00	\$1,090.00	\$2,250.00
Line Item #5 Pricing: Additional Requirements	Included In Total Price	Included In Total Price	Included In Total Price
TOTAL AMOUNT PROPOSED:	\$7,155.00	\$1,090.00	\$2,250.00

LINE ITEM #1: 2012 Reserve Study UPDATE.

Homeowners Association

File(s) Provided to Vendors: None

Swaysland Professional Engineering Consultants, Inc.:

NOTES: NONE

EXCEPTION(S): NONE

Association Reserves:

NOTES: NONE

EXCEPTION(S): NONE

ALLIED BUILDING INSPECTION SERVICES, INC.:

NOTES: NONE

EXCEPTION(S): NONE

LINE ITEM #2: Structures and Elements Maintained by Association.

See Attached File - UPDATE TO RESERVE STUDY

File(s) Provided to Vendors: Oakridge_Reserve_Schedule.pdf

Swaysland Professional Engineering Consultants, Inc.:	LINE ITEM PRICE: \$ 7,155.00
NOTES: NONE	
EXCEPTION(S): NONE	
Association Reserves:	LINE ITEM PRICE: \$ 0.00
NOTES: NONE	
EXCEPTION(S): NONE	
ALLIED BUILDING INSPECTION SERVICES, INC.:	LINE ITEM PRICE: \$ 0.00
NOTES: NONE	
EXCEPTION(S): NONE	

LINE ITEM #3: Type of Reserve study.
Component

File(s) Provided to Vendors: None

Swaysland Professional Engineering Consultants, Inc.:	LINE ITEM PRICE: \$ 0.00
NOTES: NONE	
EXCEPTION(S): NONE	
Association Reserves:	LINE ITEM PRICE: \$ 0.00
NOTES: NONE	
EXCEPTION(S): NONE	
ALLIED BUILDING INSPECTION SERVICES, INC.:	LINE ITEM PRICE: \$ 0.00
NOTES: NONE	
EXCEPTION(S): NONE	

LINE ITEM #4: Service Level.

Full - Reserve vendor does a component inventory, a condition assessment (based upon on-site visual observations), and life and valuation estimates to determine both a fund status and a funding plan.

File(s) Provided to Vendors: None

Swaysland Professional Engineering Consultants, Inc.:	LINE ITEM PRICE: \$ 0.00
NOTES: NONE	
EXCEPTION(S): NONE	
Association Reserves:	LINE ITEM PRICE: \$ 1,090.00
NOTES: NONE	
EXCEPTION(S): NONE	
ATTACHMENT(S): 23187-0_Oakridge_POA.pdf	
ALLIED BUILDING INSPECTION SERVICES, INC.:	LINE ITEM PRICE: \$ 2,250.00
NOTES: NONE	
EXCEPTION(S): NONE	

LINE ITEM #5: Additional Requirements.

Certified Reserve Specialist Designation

File(s) Provided to Vendors: None

Swaysland Professional Engineering Consultants, Inc.:

NOTES: We are a consulting engineering firm. The work will be performed by Professional Engineers registered in the State of Florida.

EXCEPTION(S): NONE

Association Reserves:

NOTES: We are a consulting engineering firm. The work will be performed by Professional Engineers registered in the State of Florida.

EXCEPTION(S): NONE

ALLIED BUILDING INSPECTION SERVICES, INC.:

NOTES: We are a consulting engineering firm. The work will be performed by Professional Engineers registered in the State of Florida.

EXCEPTION(S): NONE

GENERAL NOTES & WARRANTY:

Swaysland Professional Engineering Consultants, Inc.:

GENERAL NOTES:

Our firm is licensed and insured.ATTACHMENT(S):

WARRANTY:

Not Specified

ATTACHMENT(S): No Files

Association Reserves:

GENERAL NOTES:

NONEATTACHMENT(S): [rfp](#)

WARRANTY:

Not Specified

ATTACHMENT(S): No Files

ALLIED BUILDING INSPECTION SERVICES, INC.:

GENERAL NOTES:

NONEATTACHMENT(S):

WARRANTY:

Not Specified

ATTACHMENT(S): No Files

SPECIAL REQUIREMENTS -- Vendors meet the following requirements:

MINIMUM ESTABLISHED REQUIREMENTS:

License Bond

Minimum Liability Insurance Amount Required:

Swaysland Professional Engineering Consultants, Inc.:

Professional License: [SRS.pdf](#), [JCE.pdf](#), [TH.pdf](#), [EMS.pdf](#), [SPEC.pdf](#), [Stan.pdf](#), [John.pdf](#), [Tomas.pdf](#), [Evan.pdf](#), [biz.pdf](#)

General Liability Insurance: [COI_2013.pdf](#)

Workers Comp Insurance: [COI_2013.pdf](#)

W-9: [SKMBT_C25311101813190.pdf](#)

Association Reserves:

Occupational License: [WSimons_RS_Designation.PDF](#)

Professional License: [WSimons_RS_Designation_\(3\).pdf](#)

General Liability Insurance: [AR_COI-Exp5-31-14.pdf](#)

Workers Comp Insurance: [AR_COI-Exp5-31-14.pdf](#)

W-9: [W9_-_Association_Reserves_-_FL,_LLC_.pdf](#)

ALLIED BUILDING INSPECTION SERVICES, INC.:

Occupational License: [Allied_Local_Business_Tax_Receipt.jpg](#), [2010-2011_Occupational_License.pdf](#)

Professional License: [AlliedCOI_Exp10-1-13.pdf](#)

General Liability Insurance: [AlliedCOI_Exp10-1-13c.pdf](#)

W-9: [w9_2011.pdf](#)

2012 Reserve Study UPDATE
Oakridge Property Owners Association | RFP #183588


Industry Solicited: **Reserve Studies, Appraisals**
 Service Location: **Common areas**

Closed On: **11-28-2011**
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 Alt.Proposals Submitted: **0**

High Bid: **\$0.00**
 Low Bid : **\$0.00**
 Average Bid : **\$3,141.50**

DESCRIPTION	VENDOR 1
	
Company Name:	Association Reserves
Vendor Apple Rating: (Based on customer surveys & vendor follow through)	 5 Out of 5
Vendor Address:	80 SW 8th Street, Miami (Offices also in Orlando), Florida 33130
Contact Name:	Will Simons
Office Number:	(800) 403-9011
Alt.Number:	(305) 619-9544
Mobile Number:	N/A
Email Address:	wsimons@reservestudy.com
Business Established:	1986
General Liability:	\$2,000,000
Workers Comp. Policy?	Yes
In-House Vendor? (Vendor affiliated with management company)	No
TOTAL AMOUNT PROPOSED:	\$2,071.00
Alternate Proposal?	No

ITEMIZED PRICING BREAKDOWN

DESCRIPTION	VENDOR1
	
Company Name:	Association Reserves
Line Item #1 Pricing: 2012 Reserve Study UPDATE	Included In Total Price
Line Item #2 Pricing: Structures and Elements Maintained by Association	\$0.00
Line Item #3 Pricing: Type of Reserve study	\$981.00
Line Item #4 Pricing: Service Level	\$1,090.00
Line Item #5 Pricing: Additional Requirements	Included In Total Price
TOTAL AMOUNT PROPOSED:	\$2,071.00

LINE ITEM #1: 2012 Reserve Study UPDATE.

Homeowners Association

File(s) Provided to Vendors: None

Association Reserves:

NOTES: We are a consulting engineering firm. The work will be performed by Professional Engineers registered in the State of Florida.

EXCEPTION(S): NONE

LINE ITEM #2: Structures and Elements Maintained by Association.

See Attached File - UPDATE TO RESERVE STUDY

File(s) Provided to Vendors: Oakridge_Reserve_Schedule.pdf

Association Reserves:	LINE ITEM PRICE: \$ 0.00
NOTES: We are a consulting engineering firm. The work will be performed by Professional Engineers registered in the State of Florida.	
EXCEPTION(S): NONE	

LINE ITEM #3: Type of Reserve study.

Component

File(s) Provided to Vendors: None

Association Reserves:	LINE ITEM PRICE: \$ 981.00
NOTES: This is the additional fee required to guarantee delivery by within 2 weeks of proposal acceptance.	
EXCEPTION(S): NONE	

LINE ITEM #4: Service Level.

Full - Reserve vendor does a component inventory, a condition assessment (based upon on-site visual observations), and life and valuation estimates to determine both a fund status and a funding plan.

File(s) Provided to Vendors: None

Association Reserves:	LINE ITEM PRICE: \$ 1,090.00
NOTES: This fee is for our normal 8-week turnaround. In order to guarantee delivery of the completed study within 2 weeks of proposal acceptance, an additional premium of 90% would apply.	
EXCEPTION(S): NONE	
ATTACHMENT(S): 23187-0_Oakridge_POA.pdf	

LINE ITEM #5: Additional Requirements.

Certified Reserve Specialist Designation

File(s) Provided to Vendors: None

Association Reserves:

NOTES: This fee is for our normal 8-week turnaround. In order to guarantee delivery of the completed study within 2 weeks of proposal acceptance, an additional premium of 90% would apply.

EXCEPTION(S): NONE

GENERAL NOTES & WARRANTY:

Association Reserves:

GENERAL NOTES:

NONE

WARRANTY:

Not Specified

ATTACHMENT(S): No Files