



PROPOSAL REPORT COVER PAGE



Katherine Balliache
GRS MANAGEMENT ASSOCIATES, INC.

RFP#: 999649

RFP Title: First Time Reserve Study
GREYSTONE AT BOYNTON BEACH HOMEOWNERS
ASSOCIATION INC

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.

First Time Reserve Study
GREYSTONE AT BOYNTON BEACH HOMEOWNERS ASSOCIATION INC | RFP #999649

Industry Solicited: **Reserve Studies, Appraisals**
Service Location: **Common areas, Gate/Guard House, Club House, Pool, Parking Lot, Recreation Center, Other**

Closed On: **11-20-2012**
Proposals Submitted: **4**
Alt. Proposals Submitted: **0**

High Bid: **\$9,745.00**
Low Bid : **\$3,500.00**
Average Bid : **\$5,173.00**

DESCRIPTION	VENDOR 1	VENDOR 2	VENDOR 3
Company Logo:			
Company Name:	M2E Consulting Engineers	Association Reserves	Community Advisors-The Sheppard Company
Vendor Apple Rating: (Based on customer surveys & vendor follow through)	 4 Out of 5	 5 Out of 5	 4 Out of 5
Vendor Address:	5815 SW 68th Street, Miami, Florida 33143	80 SW 8th Street, Miami (Offices also in Orlando), Florida 33130	9838 Old Baymeadows Road #104, Jacksonville, Florida 32256
Contact Name:	Richard Camino	Will Simons	Charles Sheppard
Office Number:	(305) 665-1700	(800) 403-9011	(904) 303-3275
Alt. Number:	N/A	(305) 619-9544	(904) 303-3275
Mobile Number:	N/A	N/A	(904) 303-3275
Email Address:	rcamino@m2econsulting.com	wsimons@reservestudy.com	csheppard@sheppardcompany.com
Business Established:	2005	1986	2009
General Liability:	\$4,000,000	\$2,000,000	\$3,000,000
Workers Comp. Policy?	Yes	Yes	No
In-House Vendor? (Vendor affiliated with management company)	No	No	No
TOTAL AMOUNT PROPOSED:	\$9,745.00	\$3,720.00	\$3,900.00
Alternate Proposal?	No	No	No

First Time Reserve Study
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DESCRIPTION	VENDOR 4
Company Logo:	
Company Name:	ALLIED BUILDING INSPECTION SERVICES, INC.
Vendor Apple Rating: (Based on customer surveys & vendor follow through)	 4 Out of 5
Vendor Address:	8203 SW 124 STREET, MIAMI, Florida 33157
Contact Name:	JOHN MICALI
Office Number:	(305) 234-7377
Alt. Number:	(305) 234-7377
Mobile Number:	(786) 251-8931
Email Address:	John@ InspectionsFlorida.com
Business Established:	1993
General Liability:	\$1,000,000
Workers Comp. Policy?	No
In-House Vendor? (Vendor affiliated with management company)	No
TOTAL AMOUNT PROPOSED:	\$3,500.00
Alternate Proposal?	No

LINE ITEM #1: First Time Reserve Study.

We need an initial Reserve Study for the following:

- 1) All common structural, utility (association responsibility portion), roof items, exterior elements and finishes, for the 64 townhomes in the development
- 2) Common facilities (clubhouse, pools, gatehouse, signs, tennis court, and so forth)
- 3) Association-owned roads, sidewalks, and fences.

Note: Single family home structures are the responsibility of the homeowners, and are NOT to be a part of this Reserve Study.

File(s) Provided to Vendors: Google_Maps.jpg

M2E Consulting Engineers:	LINE ITEM PRICE: \$ 9,745.00
NOTES: Please see attached proposal for full scope and terms. The scope includes: • A thorough visual inspection of the building components in order to determine their condition and remaining life expectancy. The components that are to be studied are short-lived building or site components. This includes components that require replacement prior to the overall estimated end life of the buildings or structures. Florida Statutes requires consideration for sea wall, roofs, exterior paint and/or waterproofing, pavement and all items that have an estimated replacement cost above \$10,000. • Document building components through pictures and field notes. • Analyze the building elements based on their existing conditions. • Estimate the replacement cost of the building components. • Review the existing reserve funds and perform financial analysis. The analysis will be performed using the two accepted methods in the industry (Component Method and Cash Flow). • Provide recommendation for yearly Reserve Funding based on the Financial Analysis.	
EXCEPTION(S): NONE	
Association Reserves:	LINE ITEM PRICE: \$ 3,720.00
NOTES: All assets listed above will be included in accordance with National Reserve Study Standards.	
EXCEPTION(S): NONE	
Community Advisors-The Sheppard Company:	LINE ITEM PRICE: \$ 3,900.00
NOTES: Please see full Reserve Study proposal (PDF) attached. Meetings, Site Visits & Process - We will use the information received from your Manager or Board Member to build a list of components that will be included in your Reserve Study. - We will then perform the Physical Analysis (site visit) and will meet with Managers or Board Members to discuss any concerns that you may have. The purpose of the site visit is to collect information about each component that includes quantity, age, condition and remaining useful life. - Upon completion of the site visit, a list of Components will be sent to you for review and approval to include in your Reserve Study. Additional components added after approval may require your Reserve Study to be revised and are subject to additional cost. - If we are conducting an update then we will review the previous Reserve Study to include any new components or changes in component remaining useful life. - From our site visit we then complete the Financial Analysis which includes a review of you existing funding plan, reserve fund balances and other important information. - Your Reserve Study is then completed and sent for your review. - We are available to meet with you and discuss your Reserve Study subject to availability and travel expenses. We are always available by phone at no cost. - We will modify your Reserve Study one time at no additional cost if requested within 60 days of issue. Your Reserve Study Includes - Executive summary which is easy to read and understand. - Complete inventory of major components. - Component replacement cost, useful life and remaining useful life projections. - Opinion on the status of your current funding plan. - Various funding models used to determine future funding levels. - Recommendation for annual contributions. - Graphic illustrations of your funding plan. - 30-Year cash flow analysis. - List of annual expenditures. - Photographs of major components. - Completed Report is sent via email in a PDF file. - CD with your Reserve Study is available for shipping cost. - Printed & bound copies available at additional cost of printing and shipping.	
EXCEPTION(S): NONE	
ALLIED BUILDING INSPECTION SERVICES, INC.:	LINE ITEM PRICE: \$ 3,500.00
NOTES: Initial reserve study as requested	
EXCEPTION(S): NONE	

GENERAL NOTES & WARRANTY:

M2E Consulting Engineers:

GENERAL NOTES:

NONE

WARRANTY:

N/A

ATTACHMENT(S): No Files

Association Reserves:

GENERAL NOTES:

NONE

WARRANTY:

Complimentary revisions to the study for material errors or inaccuracies.

ATTACHMENT(S): No Files

Community Advisors-The Sheppard Company:

GENERAL NOTES:

NONE

WARRANTY:

N/A

ATTACHMENT(S): No Files

ALLIED BUILDING INSPECTION SERVICES, INC.:

GENERAL NOTES:

NONE

WARRANTY:

N/A

ATTACHMENT(S): No Files

SPECIAL REQUIREMENTS -- Vendors meet the following requirements:

M2E Consulting Engineers:

Professional License: [MM_2011_PE_License.jpg](#)

General Liability Insurance: [M2eLiabCOI_9-14-13.pdf](#),[M2eLiabCOI_9-14-13.pdf](#),[M2eLiabCOI_9-14-13.pdf](#)

Workers Comp Insurance: [M2e_WC_Exp4-16-13.pdf](#)

W-9: [W9_M2E_LLC.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](#)

Community Advisors-The Sheppard Company:

Occupational License: [Business_License_2011-2012.pdf](#)

Professional License: [GC_License_2012.pdf](#)

General Liability Insurance: [COI_GL_2013.pdf](#),[COI_GL_2013.pdf](#)

W-9: [CA_w9.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](#)