

Request for Proposals Comparison: Review of the 2011 Revaluation

Mecklenburg County Scope of Work/Services	Pearson's Appraisal Services Inc	Tyler Technologies
<p>A. Methodology to be employed in performing the review</p>	<ul style="list-style-type: none"> <li>• Pearson's will visit and review each parcel via mobile collection and review.</li> <li>• The majority of parcels will be corrected at the site by Pearson's.</li> <li>• Those flagged for extensive review will be visited by County staff to physically review the property and make corrections.</li> <li>• All corrections will be reviewed by Pearson's. Data entry will be handled by Pearson's and the County.</li> </ul>	<p><b>Base Offering–Imaging –</b></p> <ul style="list-style-type: none"> <li>• Tyler Technologies will perform reviews via mobile collection and review.</li> <li>• Providing Sketch Verification services converting buildings to GIS shapes and placed and rotated of the most recent County aerial photography to highlight potential deficiency's and discovery.</li> <li>• Provide imaging, and data verification software to review the work of the vendor in compliance with acceptance testing.</li> <li>• Provide training and software to enable the County's professional property appraisers to review key characteristics towards valuing property in a virtual-presence environment.</li> </ul> <p><b>Alternative 1–Data Verification and Valuation (Additional to Base)</b></p> <ul style="list-style-type: none"> <li>• Manage county appraisal staff to undertake the desktop appraisal review effort.</li> <li>• Provide direction to the County to field check suspect parcels, and remediate.</li> <li>• Tyler will then carry on the revaluation process through completion.</li> </ul> <p><b>Alternative 2 – Traditional Data Collection and Valuation</b></p> <ul style="list-style-type: none"> <li>• Verification of the County's existing data by field visiting and walking around if possible all parcels within Mecklenburg County</li> <li>• Measuring properties when necessary and valuing the properties in accordance with the NC Machinery Act.</li> </ul>
<p>B. Method for reviewing data integrity of County property systems</p>	<p>With the combination of both visual and as needed walk-around inspections, data integrity is to be verified in the field by appraisal staff.</p>	<p>Tyler desktop appraisal review software will be provided and used to assist County staff in reviewing the data.</p>

<p>C. Determination of market value for properties broken down by components (land, building, features,etc) using three approaches: sales, cost, and income</p>	<p>The determination of market value shall be calculated using the county’s AssessPro CAMA Software.</p>	<ul style="list-style-type: none"> <li>• A matrix is built focusing on, “Year Built” and the “Condition, Desirability, and Usefulness” (CDU) rating of the dwelling.</li> <li>• Tables are calibrated to reflect the local market conditions for Mecklenburg County.</li> <li>• Completed by analyzing verified sales which are contained in the sales history file.</li> </ul>
<p>D. Definition of metrics for classifying valuation quality of neighborhoods</p>	<p>Neighborhoods are broken down into major, minor, or no issues and reviewed accordingly.</p>	<ul style="list-style-type: none"> <li>• Review and establish neighborhood boundaries.</li> <li>• Reassign to larger neighborhoods as needed.</li> <li>• Finalize and provide materials to the Assessor.</li> </ul>
<p>E. Method of documenting the basis for both affirmation of values and recommended changes to values</p>	<p>Use of tablets and property record cards</p>	<p>Property record cards</p>
<p>F. Data management plan for accessing County databases, and uploading changes to County records in compliance with applicable statutes</p>	<p>Pearson’s will work with County staff to access appropriate databases, as well as review and formalize plan to upload changes.</p>	<p>Work with County staff on data management and uploads.</p>
<p>G. Internal Controls and processes for quality assurance</p>	<ul style="list-style-type: none"> <li>• Immediate review by our management staff via CAPS software.</li> <li>• Field spot checks of randomly worked parcels</li> <li>• Review of data entry work by the appraisal staff.</li> </ul>	<ul style="list-style-type: none"> <li>• Quality control audit with County Staff</li> <li>• Field supervisor rechecks all work by trainees</li> <li>• Spreadsheet reporting clerical errors will be run bi-weekly.</li> </ul>
<p>H. Process for interacting with property owners regarding changes to value</p>	<p>Follow up with property owners regarding changes to value from those requests received via Pearson’s website.</p>	<p>Public communication plan involving presentations and periodic news releases.</p>
<p>I. Capacity to present values to the BER for all appeals as a result of the review</p>	<p>Will provide support staff for all BER appeals as requested by county staff.</p>	<p>Participation and support based on need for informal and formal hearings.</p>

J. Sample reports and templates used to report value changes to the Assessor's Office and the BOCC	Please see sample reports and templates which are attached.	Did not include
Provide a communication plan to successfully report progress	Weekly status and will attend meetings as requested by the county.	Monthly Status Meetings, Quarterly executive meetings, and monthly status reports
Provide a detailed project schedule/timeline for completing scope of work	Project start date: September 2013 Project completion date: February 2015	Project start date: August 2013 Project completion date: June 2016
Submit a detailed cost to complete scope of work/services	<b>Estimated Total Bid for Proposed Work \$3,392,000</b> Per Diem Pricing: \$600 per day per certified appraiser \$280 per day per non-appraiser certified	Base Proposal-Imaging: \$874,000  Alternative 1-Desktop Review: \$5,355,000 to \$7,140,000  Alternative 2 Traditional Data Collection: \$10,710,000 to \$14,280,000
Identify the level of County staff support expected to carry out scope of work/services	No Answer	No Answer
Identify all resources that can/will be provided	<ul style="list-style-type: none"> <li>• Office Space for Project Staff</li> <li>• Computer hardware and any software licenses for office use</li> <li>• Internet and local telephone service</li> <li>• Office Supplies, Paper and Toner</li> <li>• Printed GIS Maps upon request</li> </ul>	<u>Tyler will provide:</u> door hangers, data mailers, and income and expense reports