

REPORT

REPORT TO: Chair and Members of the Community and Corporate Affairs Committee

REPORT FROM: Kevin Okimi, Manager of Parks and Open Space

DATE: January 3, 2019

REPORT NO.: RP-2019-0003

RE: Award of Request for Proposal P-18-160 for Property Appraisal Services

RECOMMENDATION:

THAT Report RP-2019-0003, dated January 3, 2019, regarding Award of Request for Proposal P-18-160 for Property Appraisal Services, be received;

AND FURTHER THAT the contract for Property Appraisal Services be awarded to the following roster at a total estimated amount of \$40,000.00 (plus HST) per year for a two (2) year contract with two (2) one (1) year options to renew based on satisfactory service and price negotiations:

1. Antec Appraisal Group Inc. 1022 Waterdown Road, Burlington, ON L7T 1N3
2. Cushman & Wakefield Ltd. 161 Bay Street, Suite 1500, PO Box 602, Toronto, ON M5J2S1
3. Jacob Ellen & Associates Inc., 25 Main Street West, Suite 920, Hamilton ON, L8P 1H1
4. Stephen P. Saxe Ltd., 10319 15 Side Road, Halton Hills, ON L7G 4S6

AND FURTHER THAT Council authorize the Manager of Purchasing to issue the necessary purchase orders as required for the two (2) year period and additional renewals if exercised.

BACKGROUND:

The Town of Milton, on behalf of the Town of Halton Hills and the Town of Milton, solicited proposals for Property Appraisal Services. The objective of the Request for Proposal process was to select a roster of qualified property appraisal firms. Staff will select a firm from the roster whose expertise best meets the requirements of the assignment. Services include property appraisals for property acquisitions, dispositions

or other land transactions such as cash-in-lieu of parkland and easement valuations, road widenings, open space lands and lands for expropriation purposes.

COMMENTS:

A Request for Proposal was issued on November 7, 2018 by the Town of Milton. The bid was advertised on the Town of Milton's website and on the bidsandtenders.ca website. Seven (7) firms downloaded the bid document and six (6) proposals were received on November 28, 2018. Proposals were received from the following firms:

Antec Appraisal Group Inc., Burlington
Avison Young Valuation & Advisory Services, Markham
Cushman & Wakefield Ltd., Toronto
Jacob Ellens & Associates Inc., Hamilton
McKenzie Ray Heron & Edwardh, Toronto
Stephen P. Saxe Ltd., Halton Hills

The following criteria were used to evaluate the information contained in each submission. The evaluation criteria and weighting was stated in the Request for Proposal.

- Qualifications and Experience of the Firm, Project Team and each Team Member (30%)
- Experience with the Local Market (15%)
- Value Added Services (5%)
- Understanding and Methodology of the Project and Timeframes for Report Delivery (25%).
- Financial (25 %).

Staff recommends that the proposals for Property Appraisal Services be awarded to the four (4) highest ranked proponents meeting the qualifications outlined in the Request for Proposal. The recommended firms are Antec Appraisal Group Inc., Cushman & Wakefield Ltd., Jacob Ellens & Associates Inc. and Stephen P. Saxe Ltd. Antec Appraisal Group Inc. and Stephen P. Saxe Ltd. have completed work for the Town in previous years, and have demonstrated satisfactory knowledge of the local market. Staff will select appraisers for the specific assignments based on the areas of expertise outlined in their proposals.

All requests for proposals are submitted in confidence and evaluated on several pre-determined criteria. As price is only a portion of the bid, the prices of the unsuccessful proponents are not included in this report.

RELATIONSHIP TO STRATEGIC PLAN:

There is no direct relationship to the Strategic Plan.

FINANCIAL IMPACT:

The initial term of this contract is for two years with firm pricing for this term. There are two (2) additional one (1) year renewal options based upon satisfactory service and negotiated pricing. It is estimated that the annual value will be \$40,000.00 plus HST. Monies would come from the individual department's operating and respective capital budgets.

CONSULTATION:

Recreation & Parks staff have worked together with staff from the Purchasing section and Transportation and Public Works department as well as staff from the Town of Milton on this joint project and all are in agreement with the report.

PUBLIC ENGAGEMENT:

Not applicable.

SUSTAINABILITY IMPLICATIONS:

The Town is committed to implementing our Community Sustainability Strategy, Imagine Halton Hills. Doing so will lead to a higher quality of life.

The recommendation outlined in this report is not applicable to the Strategy's implementation.

COMMUNICATIONS:

Purchasing staff will communicate this recommendation to all staff that require these services.

CONCLUSION:

Staff recommend the award of the Request for Proposal for Property Appraisal Services to Antec Appraisal Group, Cushman & Wakefield, Jacob Ellens & Associates and Stephen P. Saxe Ltd. and that the Manager of Purchasing issue the appropriate purchase orders as required for the term of the contract.

Reviewed and Approved by,

A handwritten signature in cursive script that reads "Simone Gourlay".

Simone Gourlay, Manager of Purchasing

A handwritten signature in cursive script that reads "Warren Harris".

Warren Harris, Commissioner of Recreation and Parks

A handwritten signature in cursive script that reads "Brent Marshall".

Brent Marshall, CAO