

DATE

Re: Proposal Request for Full Value City Property Assessment Services

The City of Stoughton is soliciting proposals from qualified firms to provide property assessment services for the City of Stoughton, Wisconsin (hereafter, referred to as "City"). The following information is provided to assist qualified firms with their proposals in response to this RFP:

Background Information

The City is located in Dane County with a 2010 Census population of 12,611. The 2014 Equalized Value (excluding manufacturing) for the City is \$877,946,000. A current breakdown of property values and parcels is included below. The City has maintained full value assessments of property for approximately 10 years.

	Residential	Commercial	Agricultural	Other	Total
2014 Equalized Value	\$694,785,500	\$164,773,700	\$149,700	\$57,100	\$859,766,000
Number of properties: Parcels/Improved	4,120/3,863	455/397	204/0	8/0	4,787/4,260

In addition to the above real property, in 2014 there were a total of 343 personal property owners in the City with a total personal property value of \$18,180,000.

Specific Services Required

1. Assessor will perform all of the work required to properly and professionally assess the real and personal property of the City in accordance with applicable Wisconsin State Statutes.
2. Assessor shall maintain "full-value" assessments for all non-manufacturing parcels in the City. These parcels must be physically inspected (**interior and exterior**) in a five-year inspection cycle. To assure the attainment of this objective, the City has instituted the following annual inspection process to be completed: (a) new construction, annexed properties, exempt status changes, and zoning changes shall be inspected; (b) properties affected by legal description changes, building removal, fire, significant remodeling, or other major condition changes shall be inspected; (c) all properties sold shall be inspected; (d) requests for review by property owners made to the Board of Review shall be inspected during the next assessment cycle; (e) inclusive of the properties listed above, the Assessor shall physically inspect (**interior and exterior**) approximately one-fifth (20%) of total non-manufacturing parcel count as shown on the prior year's final City Clerk's Statement of Assessment. **At the Assessor's expense, a certified letter will be sent to the property owner**

for interior inspections requesting entry. All interior inspection appointments would be handled by the assessor through a 1-800 number.

3. Assessor will review and assess all properties that were under partial construction as of January 1st of the previous year.
4. Assessor will review and assess new construction as of January 1st of the current year.
5. Assessor will mail out state approved blotters to all holders of personal property in the City, audit the returned forms and place the new values in the assessment roll.
6. Assessor will account for all buildings destroyed or demolished.
7. Assessor will implement use value assessments of agricultural lands per specifications set forth by the Wisconsin Department of Revenue.
8. Assessor will process parcel subdivisions, lot line adjustments, new plats and any other land divisions.
9. Assessor will correct legal descriptions as appropriate.
10. Assessor will take digital photographs of new construction on or about January 1st annually, also on the review process if needed.
11. The City will provide limited clerical services to aide the assessor. This limited support will include answering routine telephone and walk-in requests for assessment data, providing the Assessor's toll free number to residents as necessary, and provide copies of all building permits and commercial building plans as requested. The Assessor will be responsible for all other clerical duties, including: preparing appointment mailers, stuffing envelopes and mailing all notices; all filing of assessment cards and records; all assessment data entry, and scheduling/rescheduling all assessment related appointments.

The City shall not be responsible for any Assessor office supplies with the exception of providing for assessment file folders and other items that are kept in the permanent custody of the City. Sufficient office space, desks, chairs, telephone and data connections will be provided for the Assessor's use at the Stoughton City Hall.

12. Assessor will maintain property owner lists, with current name and address changes.
13. All data will be displayed on the assessor's website at no expense to the municipality. Data will be given to the Clerk no later than 14 days after Board of Review. The data is owned by the municipality.
14. Assessor will post assessments to real estate transfer returns and record sale information to property record cards.

15. Assessor will be responsible for maintaining recent plat and subdivision maps on file and updated accordingly.
16. Assessor will annually update all property owner record cards with new legal description labels.
17. Assessor will mail Notices of Increased Assessment to property owners and others as required.
18. Assessor will conduct Open Book sessions in accordance with Wisconsin State Statutes, however, at a minimum the Assessor shall provide at least two (2) full days or twenty-four hours of time each year for Open Book sessions. Assessor shall prepare a written statement regarding Open Book dates, times, and instructions on how to set up an appointment for an Open Book session, at least one month prior to the first Open Book session. The intent is to broadcast this statement on the Public Access Channel (Channel 12) and to issue the statement to the local press for publication prior to Open Book. **All open book appointments would be handled by the Assessor through a 1-800 number.**
19. Assessor will be responsible for insuring that all procedures are properly completed for the Board of Review proceedings to be held prior to the middle of May each year. Assessor will also attend the Board of Review meeting, defending the Assessor's valuation and work products.
20. Assessor will be responsible for providing the Wisconsin Department of Revenue with final reports of assessed valuations after the Board of review meeting.
21. The City currently has three (4) Tax Increment Districts. The Assessor shall be required to complete all State of Wisconsin Department of Revenue TID reports regarding valuations on time.
22. Assessor will conduct office hours at the **Stoughton City Hall 381 E Main Street as necessary but no less than for two (2) eight-hour work days per month (8:00 a.m. to 5:00 p.m.)**. The City, in consultation with the Assessor, will determine these office hours.
23. Assessor will also provide a local or toll-free phone number for City officials and residents to contact assessor during regular business hours, Monday through Friday, and shall return calls within forty-eight (48) hours.
24. Assessor will supply to the City a complete set of computer property assessment records (including digital photographs of each property) that are compatible with the City's computer equipment and software. Assessor will provide digital photographs with comparable properties in preparation for Board of Review meeting(s) so that the Board and the petitioner have evidence of comparability. Additionally, the Assessor shall update the City's assessment computer records within fourteen (14) days of the final adjournment of the Board of Review.

25. The choice of assessment software is up to the assessor, subject to acceptance by the City. However, any software selected should have the following attributes/abilities:
- A. Have a statistical package that includes descriptive statistics and regression analysis.
 - B. Comparative sales report that can be used to support individual assessments with adjustments shown.
 - C. Flexible cost and depreciation tables that can be adjusted to capture specific markets.
 - D. The ability to electronically export the completed assessment roll to the Dane County Tax Listing Office in the format required. This eliminates any manual data entry of the completed roll.
 - E. The ability to import "start-up data" from the Dane County Information Technology offices. This would also be used to set up the City's computerized system, to avoid time/cost consuming initial data entry. Typical imported data would include owners name(s), mailing address, parcel address, legal description, parcel number, etc.
 - F. Building Permit record keeping.
 - G. Sales data can be kept, stored and accessed.
 - H. Has the ability to create a wide range of reports, including assessment roll, Assessor's final report, etc,
 - I. Has the ability to run queries to locate specific data.
 - J. Must use standard database format, such as Microsoft Access, that can be read or easily converted to be read by other software packages.
 - K. Assessor will annually provide municipality with a copy of the database used, together with file maps and descriptions, and all associated digital photos. This database will become the property of the municipality. Proprietary database formats exclusive to a particular software package are unacceptable.
 - L. Hard copy printouts for all parcels shall be provided and placed in existing property record cards. The printout's format and data provided shall be approved by the Department of Revenue and should contain the same data fields as shown on the PA-500 property record card as a minimum. All printouts containing major improvements should have digital photos attached.
 - M. Homogenous neighborhoods should be delineated and noted on assessment software.
25. Assessor will work with City to place the computer property assessment records (including digital photographs of each property) on the City's website.
26. The assessor shall communicate openly and in a timely fashion with the proper City personnel and the public in the handling of all appeals to ensure the Board of Review has all available information to render its decisions. The assessor is expected to present a positive professional image in both dress and conduct while interfacing with City staff and the public, especially during the appeals process. All assessor personnel shall carry proper photo identification to assure the public of their identity and purpose of gaining access to private property.
27. Digital photos are to be provided for all non-residential improvements (digital photos for all improvements are recommended over time).

28. The assessor is encouraged to interface with the business and residential community and media to provide greater clarity of the assessor's role in the property taxation process and communicate assessment scheduling.
29. The assessor shall update market values on City owned land and public buildings. Said information obtained shall be used for insurance purposes, depreciation and to establish lease values.
30. Assessor will also perform all other duties incidental to the normal duties of Assessor.

General Quotation Requirements

1. All quotations must identify the firm name, address and specific assessment services experience in Wisconsin. The proposals shall also include: the names, educational background and municipal assessment experience of the person or persons to be assigned as the City's point of contact for the work to be performed; experience with conducting a regular full value assessment process; identify experience with assessment evaluation of potential tax-exempt properties and any specific assessment experience with a large number of multi-family properties; demonstrate accuracy of assessment work; and provide examples of going above and beyond the "call of duty", with respect to serving the community and its property owners.
2. The proposal shall include the total annual compensation rate to provide the assessment services described in the above Specific Services Required and in accordance with the laws of the State of Wisconsin for assessment years 2016, 2017, 2018, 2019 and 2020 beginning no later than October 2015 (preparation work for 2016 assessment year). The City will pay the annual compensation rate in equal monthly installments.
3. Bidders shall express their fee for each year of this proposed contract (2016 through 2020) in a not-to-exceed sum to include all of the Assessor's costs including but not limited to: labor, materials, transportation costs, meals, lodging, and Board of Review expenses. All expense reimbursements will be charged against the total all-inclusive maximum price submitted by the firm. The City will retain 10% of the total fee subject to timely delivery of the certified tax roll.
4. All work shall be accomplished in accordance with the provisions of the laws of the State of Wisconsin and in full compliance with the rules and regulations promulgated by the Wisconsin Department of Revenue.
5. The proposals shall identify five references from municipal clients for which the bidder and the person or persons to be assigned as the City's point of contact for the work to be performed has provided assessment and/or revaluation services within the past two (2)

- years. References must include the name, title, address and business phone number of the contact person.
6. Bidders shall provide a detailed resume of the person or persons to be assigned as the City's point of contact for the work to be performed.
 7. The proposals shall also identify any and all contractual requirements that the bidder currently has.
 8. Identify the date when the firm would be available to begin providing assessment services to the City.
 9. All personnel providing assessing services shall be currently certified in compliance with Wisconsin State Statutes and Administration rules of the Wisconsin Department of Revenue, and shall maintain certification throughout the duration of this assignment.
 10. Bidders are advised to carefully inspect the community, the entire records and facilities of the City of Stoughton and examine the above referenced specifications for the proposed work and judge for themselves the circumstances affecting the cost of the work or the time requirements for its completion. Failure to do so will not relieve the successful bidder of the obligation to furnish and perform the work, to carry out the provisions of the contract, and to complete the contemplated work for consideration set forth in this bid.
 11. The successful bidder is not permitted to assign, subcontract or transfer the work of providing assessment services, without the prior written approval of the City.
 12. The successful bidder will have a minimum three to five years experience in municipal government assessing, including maintaining full value assessments, and will have advanced knowledge and experience in the utilization of computer applications for assessments.
 13. The proposals will be reviewed and awarded to the assessor whose quote is the most responsive to the solicitation and is the most advantageous to the City of Stoughton, considering experience, price and other factors. The City reserves the right to accept or reject any and all proposals received.
 14. If a proposal is accepted, the Assessor shall provide a certificate naming the City as additionally insured for the purposes of general and professional liability protection. Said certificate shall be in a form and amounts acceptable to the City Attorney.
 15. This proposal may not be withdrawn for a period of sixty- (60) days after the date and time set for the opening of bids. Any company may withdraw its proposal at any time prior to the submittal deadline.

Information

Four (4) copies of the proposal must be received at the Stoughton Finance Director's Office no later than 4:00 p.m. on **JULY 8, 2015**. Proposals shall be sealed and clearly marked "Stoughton Property Assessment Services". Proposals should be addressed to: Laurie Sullivan, Finance Director, City of Stoughton, 381 E. Main Street, Stoughton, WI 53589.

The Assessor will be selected by a special city assessor selection committee which will recommend a firm to be hired to the City Council. This Request for Proposal will serve as the basis of the initial services contract with the firm that is selected.

Questions regarding this Request for Proposal can be directed to Laurie Sullivan (608-873-6677) or e-mail lsullivan@ci.stoughton.wi.us.

Evaluation Criteria

The following evaluation criteria will be used to review the Assessment Services Proposals that are received and which meet the general quotation requirements:

1. Demonstration of successful experience in providing general assessment services to a municipality of similar size, particularly with experience in annual full value assessment practices.
2. Demonstration of a high level of accuracy in assessment work for municipal clients.
3. Assessment services costs.
4. Evidence of positive customer interaction/service from past municipal clients.

Thank you for your interest in this project!