



VILLAGE OF WINNECONNE

REQUEST FOR PROPOSALS
FOR ASSESSMENT AND REVALUATION SERVICES

DAVID PORTER | VILLAGE ADMINISTRATOR | 2019

Due Date: July 31, 2019

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Introduction and Purpose of Request

The Village of Winneconne invites proposals from qualified firms to perform statutory and annual maintenance work for assessment of all property within the Village for the three-year period from January 1, 2020 through December 31, 2022. Proposals should also include one interim market update revaluation of all taxable real estate.

All services rendered shall comply fully with all Wisconsin Statutes, the *Wisconsin Property Assessment Manual*, and all rules and regulations adopted by the Wisconsin Department of Revenue.

Village Information

The Village of Winneconne is located in Winnebago County with a 2010 census population of 2,350. The 2019 assessment includes the following parcels:

	Land
Residential	1,188
Commercial	95
Agricultural	8
Manufacturing	7
Undeveloped	6
Forest	1
Total Parcels	1,305

Total Assessed Value \$192,524,500
 2019 Assessment Ratio 0.890453868

There are five (5) active TIF districts.

Obligations of the Village

The Village will perform limited clerical services to assist the assessor, including:

1. Answer general correspondence concerning assessment related inquiries that Village staff is capable of answering. Provide assessor's contact information – mail, fax, email, or telephone – to residents.
2. Provide copies of all building permits and commercial plans, previous assessment rolls, and records, as requested by the assessor, at no cost.
3. Publish public notices at appropriate times during the assessment and revaluation process.
4. Provide adequate office space for assessment personnel for office hours, if necessary.

5. Provide the name, address of the owner, block and lot number, size or other identifying description of each parcel to be appraised.
6. Maintain current Village map, including lot sizes, parcel numbers, and addresses.
7. Provide access to the office during normal Village Hall hours: Monday through Friday, 8:00 a.m. to 4:30 p.m.

Scope of Work – Assessment Services

1. Assessor will perform all of the work required to properly and professionally assess the real and personal property of the Village in accordance with applicable Wisconsin State Statutes.
2. Assessor will review and assess all properties that were under partial construction as of January 1st of the previous year.
3. Assessor will review and assess new construction as of January 1st of the current year.
4. Assessor will mail out state approved forms to all holders of personal property in the Village, audit the returned forms and place the new values in the assessment roll. Doorage assessments will be made on any personal property account that has not sent in a return.
5. Assessor will account for all buildings moved, destroyed or demolished.
6. Assessor will create new property record cards for all parcels created from parcel splits and new plats. All property record cards shall be updated as needed.
7. Assessor will correct legal descriptions as needed.
8. Assessor will record assessment data, prepare appointment mailers, stuff envelopes and mail notices and schedule and reschedule appointments as necessary.
9. Assessor will mail the notices of changed/increased assessments.
10. Assessor will be responsible for completing the real estate and personal property assessment rolls.
11. Assessor will stay informed about zoning changes, conditional use permits, and other municipal decisions that impact value. Assessor will also stay informed about court decisions, Department of Revenue advisories, and other governmental decisions that impact value.

12. All data and programs will become the property of the municipality.
13. Assessor will have Village Hall office hours as mutually agreed to between Assessor and the Village, if necessary.
14. All office supplies, postage and other supplies necessary to perform the duties of the contract shall be provided by the Assessor.
15. Assessor will conduct Open Book sessions in accordance with Wisconsin State Statutes. Property owners will be given sufficient notice of changes in assessment and will be provided the opportunity to meet with the Assessor to discuss changes. The assessment roll will be available for public inspection prior to the Open Book session.
16. The Board of Review will be conducted prior to June 30th except for the year of the revaluation, or as approved by the Village Clerk.
17. Assessor will attend the Board of Review meetings and testify under oath while defending the Assessor's valuation and work products. In the event of an appeal to the courts, it is agreed that the Assessor will be available to furnish expert testimony in defense of any of the assessed values.
18. Assessor will be responsible for providing the Wisconsin Department of Revenue with final reports and TIF report per DOR regulations – the Assessor shall provide the Village a draft copy of final reports and TIF reports to be reviewed prior to their submittal to the DOR.
19. Assessor will provide a local or toll-free phone number for Village officials and residents to contact Assessor during regular business hours, Monday through Friday, and shall return calls within twenty-four (24) hours.
20. Assessor will supply to the Village a complete set of computer property assessment records that are compatible with the Village's computer equipment and software. (Computer records should be updated within thirty (30) days of the final adjournment of the Board of Review.)
21. Assessor will be available by phone to provide information to Village staff as needed, and return phone calls within twenty-four (24) hours.
22. Assessor will also perform all other duties incidental to the normal duties of Assessor.

Scope of Work – Revaluation Services:

The revaluation is to be completed at a mutually agreed upon time with the Village. In accordance with local conditions and all applicable laws of the State of Wisconsin governing the revaluation of real and personal property, the assessor will perform in a professional manner all the work required to revalue all real and personal property within the Village.

1. For the valuation of residential properties, the Assessor will use a Computer Assisted Appraisal System.
2. For the valuation of commercial properties, the Assessor will use a Computer Assisted Appraisal System.
3. For the valuation of personal property, the Assessor will follow the procedures outlined in Volume 1 of the Wisconsin Property Assessment Manual.
4. The Assessor will complete all revaluation work in a timely and professional manner in compliance with Wisconsin State Statutes and with Volume 1 of the Wisconsin Property Assessment Manual. The Assessor will complete a Market Update in line with current sales for all properties in the Village.
5. The Assessor will reconcile existing property record card data with data maintained in the Assessor's mass appraisal software program.
6. The Assessor will review all recent property sales, perform an outside inspection to verify property attributes, and take digital color photographs of all current sales.
7. The Assessor will perform sales analysis to determine value trends and help to build a valuation model specifically for the Village.
8. The Assessor will apply new valuation model to existing property record information to arrive at a new assessed value for all property in the Village.
9. The Assessor will individually review each property to ensure a fair and equitable assessment.
10. The Assessor will mail new notices of assessment along with a written explanation to all property owners.
11. Prior to the Open Book hearing period, a time for public inspection of the proposed roll will be allowed. The Open Book period should be scheduled to comply with appropriate statutes and ensure notice to affected properties.

12. The Assessor will hold a sufficient number of “Open Book” meetings with taxpayers allowing enough time for those taxpayers wishing to ask questions or provide evidence supporting a different value.
13. The Board of Review for the revaluation period will be scheduled at the mutual convenience of the Assessor, Board of Review, and the Village Clerk.
14. The Assessor will attend “Board of Review” to provide testimony supporting the assessment.
15. The Assessor will defend assessed values should a taxpayer challenge their assessment after the board of review at no additional cost to the Village.

General Proposal Requirements

1. Proposals should also include the names, educational background, and municipal assessment experience of the person or persons to be assigned as the Village’s point of contact for the work to be performed.
2. Assessor is to provide a list of municipal references for which the Assessor has provided assessment services and revaluation services. An explanation of how the Assessor would deliver the services requested and inclusion of a timetable for delivery and completion of the revaluation shall also be submitted.
3. A detailed resume of the person or persons to be assigned as the Village’s primary contact for work to be performed should be submitted.
4. All work shall be accomplished in accordance with 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 should also identify any and all contractual requirements that the bidder has.
6. All personnel providing assessment services shall be currently certified in compliance with Wisconsin State Statutes and Administrative Rules of the Department of Revenue for the type of properties in the Village of Winneconne.
7. Bidders are advised to carefully inspect the community, the entire records and facilities of the Village of Winneconne, and the above referenced specifications for the proposed work and judge for themselves the circumstances affecting the cost of the work or the time requirement 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 RFP.

8. The successful bidder is not permitted to assign, subcontract or transfer the work of providing assessment services, without the prior written approval of the Village.
9. Assessor shall maintain insurance coverage to protect against claims, demands, actions and causes of action, arising from any act or omission of the Assessor, his/her agents and employees in the execution of the work. Certificates of insurance by a company authorized to transact business in the State of Wisconsin shall be supplied to the municipality. The Village of Winneconne shall be named as an additional insured.
10. 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 Village of Winneconne, considering experience, knowledge, demonstration of a high level of accuracy in assessment work for municipal clients, high level of customer service to property owners as well as municipal clients and other factors. The conditions enumerated in this request for proposal will form the basis for the agreement between the Village and the firm providing assessor services. The final agreement will be modified upon selection and will be subject to review and approval by the Village Board.
11. Submit any additional information that is pertinent to the RFP.

Contact Information for Inquiries

Inquiries about this RFP should be directed to:

David Porter, Village Administrator
Village of Winneconne
P.O. Box 488
Winneconne, WI 54986

Phone: (920) 582-4381

Fax: (920) 582-0660

E-mail: administrator@winneconnewi.gov

Submission Instructions

The Village reserves the right to request additional written or oral information to supplement all written statements of qualifications or proposals. Interviews and presentations are anticipated and will be on an invitation basis.

Submit the original and ten (10) copies of the proposal to David Porter, Village Administrator no later than July 31, 2019.

Right to Reject

The Village of Winneconne reserves the right to reject any and all proposals and accepts no responsibility for the cost of proposal preparation.