

REQUEST FOR PROPOSALS

City Assessor



City of Platteville
75 North Bonson Street
Platteville, WI 53818

June 2019



City of Platteville
Request For Proposals
City Assessor Services

Proposal Submission Deadline: **4:00 pm, Friday, July 26, 2019**

Introduction

The City of Platteville is soliciting proposals from qualified firms or individuals to provide assessment services for the City of Platteville, Wisconsin for the years 2020 - 2022. The City is seeking a firm to serve as its statutory assessor and to perform either 1) annual maintenance valuation, or 2) annual market revaluation. We are providing the following information to assist you with your quotation proposal:

Background Information

The City of Platteville is located on the eastern edge of Grant County and along Highway 151 in Southwestern Wisconsin. The City had a 2017 estimated population of 12,457. The 2018 Equalized Value, with manufacturing and personal property, is \$694,228,000. A full "walk through" revaluation was conducted in 2018.

The City of Platteville has the following parcel counts and valuation (from the 2018 Statement of Assessment and 2018 Statement of Changes in Equalized Value).

Property Class	Total Parcels	Improved Parcels	Total Equalized Value
Residential	2,613	2,448	369,927,400
Commercial	387	336	287,393,200
Agricultural	125		140,100
Undeveloped	34		226,200
Agricultural Forest	0		0
Forest Lands	3		62,500
Other	1	1	59,300
Total	3,163	2,785	657,808,700

The City will provide limited clerical services to aid the Assessor. The limited support will include providing the Assessor's toll-free number to residents as necessary and providing 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. Temporary use of office space, desks, chairs, telephone and data connections will be provided for the Assessor's use at the Platteville City Hall on an as-needed basis.

Specific Services Required

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 and the Wisconsin Property Assessment Manual.

1. Assessor will review and assess all properties that were under partial construction as of January 1st of the previous year.
2. Assessor will review and assess new construction as of January 1 of the current year.
3. Assessor will mail out state approved forms to all holders of personal property in the City, audit the return forms and place the new values in the assessment roll.
4. Assessor will account for all buildings moved, destroyed or demolished.
5. Assessor will implement use value assessments of agricultural lands per specifications set forth by the Wisconsin Department of Revenue and complete all applicable reports.
6. Assessor will process parcel subdivisions, lot line adjustments, new plats, and any other land divisions.
7. Assessor will correct legal descriptions as appropriate.
8. Assessor will take digital photographs of new construction annually on or about January 1 and also during the review process if needed.
9. Assessor will maintain property owner lists, with current name and address changes.
10. Assessor will mail Assessment Change Notices to property owners and others as required.
11. Assessor will post assessments to real estate transfer returns and record sale information to City property record cards.

12. Assessor will be responsible for maintaining recent plat and subdivision maps on file and update accordingly.
13. Assessor will annually update all City property record cards with new legal description labels.
14. Assessor will update City Administration on work progress, valuation data and completed reports as requested.
15. Assessor will become and remain informed about zoning changes, conditional use permits, and other municipal decisions that impact value. Assessor will become and remain informed about court decisions, Department of Revenue advisories, and other governmental decisions that impact value.
16. Assessor will conduct Open Book sessions in accordance with Wisconsin State Statutes. The Assessor shall provide at least two Open Book sessions on separate days with some evening and lunch time hours included. 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 issue the statement to the local press, post to the City website, and distribute to various media prior to Open Book.
17. Assessor will be responsible for ensuring that all procedures are properly completed for the Board of Review proceedings to be held prior to the end of May each year. Assessor will also attend the Board of Review meeting(s) defending the Assessor's valuation and work products. The date for the Board of Review shall be no later than June 1 of each year unless extenuating circumstances exist that would require a mutually agreeable date to be selected after this date.
18. Assessor will be responsible for providing all assessment data to Grant County and for ensuring that the County's assessment roll is balanced to the records submitted by the Assessor.
19. Assessor will be responsible for providing the Wisconsin Department of Revenue with final reports of assessed valuations after the Board of Review meeting. Assessor will also be responsible for providing the WI DOR with assessments for all TIF Districts by the prescribed deadlines. The Assessor will provide the City a draft copy of TIF reports for its review and comments prior to their submittal to the DOR. The City may add, amend, or close Tax Increment Districts during the term of this contract.
20. Assessor will provide a local or toll-free phone number and an e-mail address for City officials and residents to contact the Assessor during regular business hours, Monday through Friday, and shall return calls and emails within sixteen (16) business hours.

21. 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.
22. 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.
23. Assessor will provide the City with a copy of the assessment database used, together with file maps and descriptions, and all associated digital photos every three months. This database will be the property of the City. Proprietary database formats exclusive to a particular software package are unacceptable

24. Assessment Software

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/capabilities:

- a. 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 Grant County in the format required.
- e. The ability to import "start-up data" from Grant County. Typical imported data would include owners name(s), mailing address, parcel address, legal description, parcel number.
- f. Building Permit record keeping.
- g. The ability to keep, store and access sales data.
- h. The ability to search specific data and to create a range of reports, including the assessment roll, Assessor's final report, etc.
- i. Must use standard database format, such as Microsoft Access, that can be read or easily converted to be read by other software packages including Excel.

- j. Hard copy printouts for all parcels shall be provided and placed in existing property record folders. 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.
 - k. Digital photos are to be provided for all residential and non-residential improvements.
25. Assessor will make the computer property assessment records (including digital photographs of each property) available on the assessor's website.
26. Assessor must 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 the 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 for gaining access to private property.
27. 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.
28. Assessor must 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.
29. Assessor, as the Contract Assessor, shall be responsible to fulfill the duties of the statutory assessor and shall perform all other duties incidental to the normal duties of the Assessor.
30. In cases where an emergency is declared, the Assessor shall assist with "damage assessments" as needed.
31. Assessor will maintain the assessment records in a format accessible to by the public and will promptly and without delay comply with proper open records requests under the Wisconsin Public Records Law. The Assessor shall also provide assessment records in electronic format such as Access or Excel as requested by Grant County or City of Platteville staff.
32. Assessor shall provide advice and opinion for assessment matters and will defend values through the appeal process beyond the Open Book and Board of Review to the Circuit

Court, the Department of Revenue, or other agencies that may be available for hearing appeals on assessment matters.

33. Assessor shall review, upon request, developer proposals with the City's TIF districts for the purpose of estimating the potential valuation of the project and to provide City staff with comments regarding the reasonableness of the real estate market assumptions included within the development proformas.

Timeline and General Proposal Requirements

The City has made every effort to include enough information in this RFP for an individual or firm to develop a responsive proposal describing their qualifications, professional expectations, and service fees. The City reserves the right to retain all proposals submitted and to use any ideas in a proposal, unless protected by copyright, regardless of whether that proposal is selected. Submission of an RFP indicates acceptance by the proposer of the conditions contained herein.

If any of the requirements in this request for proposal create a disproportionate increase in the overall cost that will be quoted, the City invites respondents to submit, along with the original proposal submission, a second proposal which addresses the requirement as an optional alternative.

Contractor's response to this RFP shall be in a sealed envelope labeled "City Assessing Services RFP" and shall address all of the following in sequential order:

1. Firm name, address and contact information.
2. Brief description of the scope of similar client relationships and specific assessment services experience in Wisconsin.
3. Description of individual or firm, including brief history, the number of employees and assessment backgrounds, philosophy regarding client service, location, years in business, qualifications etc.
4. Proposals must include the names, educational background and municipal assessment experience of the person to be assigned as the City's point of contact and persons who will actually perform the work and be present at Open Book and the Board of Review sessions. A photocopy of the licenses and certifications held by those performing any work under the RFP shall be provided.
5. For the persons who will be assigned to perform work for the City, a list of court proceedings subsequent to Board of Review in which they testified in court proceedings including:
 - Name of case

- Year of case
 - Court which heard the case
 - Deposition or in-court testimony
6. A list of all municipal clients served within the past 5 years, with status of the client indicated as past or current.
 7. Three references for which the Assessor has provided assessment services and market revaluation services within the past four (4) years. Reference information shall include:
 - Name of Client
 - Project Name
 - Contact Person with address, telephone number and email address
 - Assessor's key personnel assigned to the referenced project
 8. An explanation of how the Assessor would deliver the services requested with an estimated timetable.
 9. Individual's or firm's philosophy regarding ethics, specifically addressing conflicts of interest.
 10. Individual's or firm's ability to work with a client with a need for services that may include in addition to regular work week hours, service time at nighttime or weekend tasks.
 11. Individuals or firm's current and projected work load and its ability to meet schedules.
 12. Individual's or firm's specific abilities to provide the required professional services.
 13. Any other information that would be helpful in evaluation of the Assessor.
 14. Certificate of Insurance including General Liability, Workers' Compensation (Wisconsin), Auto Liability, and Professional Liability with limits of liability coverages having as a minimum \$1,000,000 each occurrence/\$2,000,000 aggregate (except worker's compensations which will be statutory limits). The City of Platteville shall be named as an additional insured (holding the city harmless) on the Commercial General Liability Policy should the City award the contract to the proposer.
 15. Bidders shall express their fee for each year of this proposed three-year contract (2020 – 2022) from January 1 to December 31 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. A desired payment schedule

should be outlined in the proposal. All expense reimbursements will be charged against the total all-inclusive maximum price submitted by the firm. The City may retain 10% of the total fee subject to timely delivery of the certified tax roll.

16. Bid Request options:

Option 1) Annual Maintenance Services (2020-2022)

Option 2) Annual Market Update Revaluation Services (2020-2022)

17. This proposal may not be withdrawn for a period of sixty days after the date and time set for the opening of the bids. Any company may withdraw its proposal at any time prior to the submittal deadline. Sealed bids must be received at City Hall by no later than Friday July 26, 2019 at 4:00 pm.

How To Submit

Proposals may be mailed or delivered to:

Nicola Maurer, Administration Director
Attention: City Assessor Proposal
City of Platteville
75 N. Bonson St., PO Box 780
Platteville, WI 53818

As a further alternative, proposals may be emailed as an attachment, with the email subject "City Assessor Proposal" and with the email addressed to: maurern@platteville.org.

The deadline for submission of proposals is 4:00 pm, Friday July 26, 2019.

Evaluation/Selection of Proposals

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 with similar demographics and relationship to a larger public entity.
2. Past experience with providing market revaluation services
3. Demonstration of a high level of accuracy and customer service in assessment work for municipal clients.
4. Ability to provide and maintain a computerized database of property assessment records made available to the City.

5. Evidence of positive customer interaction.

6. Cost of assessment services.

Clarifications

The City reserves the right to seek clarification of each proposal submitted. The City also reserves the right to require other evidence of technical, managerial, financial, or other abilities prior to selection.

By responding to this RFP an individual respondent accepts the process outlined in this RFP and fully acknowledges that the final determination of the City of Platteville is binding and without appeal.

Process

City staff will review all RFPs and may select one or more finalists for interviews. Additionally, staff may request submission of supplemental materials. The selected assessor(s) or firm will be the one that in the judgment of City staff best demonstrates the ability to provide the broadest range of high-quality assessor services in the most cost-effective manner. Upon completion of the evaluation process by City staff, the City Manager will advise the respondents of the selection and negotiate the appropriate agreement. The tentative agreement will define the extent of services to be rendered, method and amount of compensation. The selected respondent will need to enter into a contract with the City. The City reserves the right to negotiate a final contract that is in the best interest of the City. The proposal will become a part of the agreement. The City Assessor serves at the pleasure of the Common Council. The contract may be terminated at any time by the Common Council. Once a tentative agreement is prepared, it will be presented to the Common Council to award the contract.

The anticipated timeline for selection is:

Deadline for Receipt of Proposals	4:00 pm Friday July 26, 2019
Interviews (if any)	*August 1, 2019
Council award of assessor services contract	August 27, 2019
Anticipated commencement of contract	January 1, 2020

*(respondents are requested to hold this date on their calendar)

In addition to all other rights granted to it under Wisconsin Law, the City of Platteville reserves the right to waive formalities in the proposal process; to accept or reject any or all proposals

received as a result of this request; to request additional information concerning any proposal; to accept or negotiate modifications to any proposal; to negotiate with qualified assessors; to interview any respondent; to cancel, in part or in its entirety, the request for proposals; or to waive any irregularities in any proposal following the proposal submission deadline date to serve the best interests of the City. The City also reserves the right to negotiate separately with any respondent whatsoever, in any manner necessary to serve the best interests of the City. This request for proposals does not commit the City to pay any costs incurred in the preparation or evaluation of a proposal.

All inquiries regarding this Request for Proposals should be directed by e-mail to Nicola Maurer, Administration Director, at: maurern@platteville.org.

Thank you for your interest in this RFP!