



**GRAFTON**  
QUALITY LIFE. NATURALLY.

**Request for Proposals  
For  
Village Assessment Services**

**INQUIRIES AND PROPOSALS SHOULD BE DIRECTED TO:**

Jesse Thyges  
Village Administrator  
860 Badger Circle  
Grafton, WI 53024

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## **Introduction**

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The Village of Grafton invites proposals from qualified individuals or firms to provide assessment and revaluation services for the Village of Grafton, Wisconsin (hereafter, referred to as “Village”). The Village seeks assessment services for a four and a half year term to commence April, 2018 through 12/31/2022.

The Village of Grafton currently includes 4,371 parcels of land. These parcels must be documented and assessed annually.

## **Scope of Work**

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The awarded contractor will be the statutory assessor for the Village of Grafton and complete in a professional manner all the work required under this proposal in accordance with Wisconsin State Statutes and the Wisconsin Property Assessment Manual. Within fifteen (15) days following the award of a contract the selected contractor shall furnish the Village with a performance bond or other instrument of security acceptable to the Village, equal in value to the sum of the contract. Said security instrument shall guarantee faithful and timely performance of the duties of the statutory assessor and the delivery/redeliver/surrender of all records, data, software, and assessment work product, which shall collectively be deemed work for hire and shall remain at all times the property of the Village.

The assessor shall commence work April 1, 2018 or earlier as mutually agreed.

The Village of Grafton is currently comprised of 4,371 parcels, of which only 38 are manufacturing. The Village last completed a Village-wide revaluation in 2014. The current assessment ratio, as of January 1, 2018, is approximately 90.1%, it is anticipated that a Village-wide reevaluation will occur during the term of this contract.

During the course of this contract, the Assessor shall provide services in accordance with all applicable Wisconsin State Statutes (Chapter 70), as amended, Wisconsin Department of Revenue and other applicable State agency rules and regulations, as amended, case law and this contract, and including *Standard Specifications for Revaluation of General Property Pursuant to Chapter 70 Wisconsin Statutes* promulgated by the Wisconsin Department of Revenue, to provide the standard specifications for the scope of assessment services to be provided by the Assessor, except as modified by the terms and specifications of this contract.

Computer software to be used shall be comprehensive software as mutually agreed upon and will be provided by the assessment firm. Said software shall be compatible with the Village’s G-Prop (Dash software) assessment/property data software package.

## Background Information

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The Village is located in southern Ozaukee County and as of the 2010 Census, the recorded population was 11,459. The 2017 Assessed Value (including manufacturing and personal property) for the Village is \$1,163,334,700. A breakdown of property values and parcels is below, but is subject to change due to demolition or development

### 2017 Village Statement of Assessment

REAL ESTATE	PARCELS OF LAND	ACRES	LAND VALUE	IMPROVEMENT VALUE	TOTAL
RESIDENTIAL	3,804	916.5	261,359,600	525,714,300	787,073,900
COMMERCIAL	301	545.8	81,643,400	238,653,300	320,296,700
MANUFACTURING	38	161.1	10,058,600	44,642,300	54,700,900
AGRICULTURAL	10	209.2	40,100		40,100
UNDEVELOPED LAND	9	67.9	771,400		771,400
AGRICULTURAL FOREST	3	15	112,500		112,500
FOREST LANDS	1	30.5	229,000		229,000
OTHER	1	1	40,400	69,800	110,200
EXEMPT	204	519.5			
<b>TOTALS</b>	<b>4,371</b>	<b>2466.5</b>	<b>354,225,000</b>	<b>809,079,700</b>	<b>1,163,334,700</b>

## Specific Services Required

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1. Assessor will perform all of the work required to properly and professionally assess the real and personal property of the Village, except manufacturing property, in accordance with applicable Wisconsin State Statutes.
2. Assessor will review and assess all properties that were under construction as of January 1<sup>st</sup> of the previous year.
3. Assessor will review and assess new construction as of January 1<sup>st</sup> of the current year.
4. Assessor will mail out state approved blotters to all holders of personal property in the Village, audit the returned forms, and place the new values in the assessment roll.
5. Assessor will account for all buildings destroyed and/or demolished.
6. Assessor will implement use value assessments of agricultural lands per specifications set forth by the Wisconsin Department of Revenue.
7. Assessor will process parcel subdivisions, lot line adjustments, new plats and any other land divisions.

8. Assessor will correct legal descriptions as appropriate.
9. Assessor will take digital photographs of new construction on or about January 1<sup>st</sup> annually, also during the review process if needed.
10. Assessor will maintain property owner lists, with current name and address changes.
11. Assessor will post assessments to real estate transfer returns. Said records are the property of the Village of Grafton and are subject to open record requests and the assessing firm must comply with those type of requests.
12. Assessor will be responsible for maintaining recent plat and subdivision maps and aerial photographs on file and updated accordingly.
13. Assessor will mail Notices of Increased Assessment to property owners and others as required.
14. Assessors will coordinate with the Village Clerk to conduct Open Book sessions in accordance with Wisconsin State Statutes. Assessor shall prepare a written statement regarding Open Book dates and times, at least one month prior to the first open book session.
15. Assessor will be responsible for ensuring that all procedures are properly completed for the Board of Review proceedings to be held prior to the beginning of June each year, unless the Village Board determines otherwise. Assessor will also attend the Board of Review meeting, defending valuations and work product.
16. Assessor will be responsible for providing the Wisconsin Department of Revenue with both preliminary and final reports of assessed valuations in accord with Wisconsin State Statutes.
17. The Village currently has four (4) Tax Increment Financing Districts with the potential for the creation of a fifth. The Assessor shall be required to complete all State of Wisconsin Department of Revenue TID reports regarding valuations on time.
18. The Assessor will supply to the Village a complete set of computer property assessment records, including digital photographs and CAD drawings of each property, as required by the WI DOR in 2015. Assessor will provide copies of photographs with comparable properties in preparation of Board of Review meeting(s) so that the Board and the petitioner have evidence of comparability. Additionally, the Assessor shall update the Village's assessment computer records within fourteen (14) days of the final adjournment of the Board of Review.
19. The Assessor shall communicate openly and in a timely fashion with the proper Village 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 Village Staff and Property Owners.
20. The Assessor is encouraged to interface with the business and residential community to provide greater clarity of the assessor's role in the property taxation process and communicate assessment scheduling.

21. The Assessor shall update market values on Village owned land and public buildings. Said information obtained shall be used for insurance purposes, depreciation and to establish lease values.
22. The Assessor shall be available to attend Village Board, Finance Committee, court proceedings, and other related meetings on an as needed basis.
23. The Assessor shall be familiar with the responsibilities of complying with Wisconsin's open records law and proper administration of that law with respect to assessment records.
24. Assessor will also perform all other duties incidental to the normal duties of the assessor.
25. Assessor shall supply all of Assessor's field representatives with identification cards, including the name, company, telephone number, certification from WI-DOR, and photograph of the employee.

## **Assessing Software and Staffing**

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1. **Use of assessing software.** Computer software to be used shall be comprehensive software as mutually agreed upon and will be provided by the assessment firm.
  - a. The software must have the ability to electronically export the completed assessment roll to the Ozaukee County Treasurer.
  - b. The software must have the ability to import "start-up" data from the Ozaukee County Register of Deeds.
  - c. The software must give the user the ability to search multiple fields such as House Number, Street, etc.
  - d. Include as part of supplemental information along with your proposal what the ability of your software is to interface with G-Prop Software package from Dash Software. This is not required for the proposal and is only supplemental in nature.
2. **Staffing.** The Village currently employs 0.5 FTE Assessment Technician. Currently the position performs tasks such as:
  - a. Answering routine phone requests for assessment data.
  - b. Providing Assessor contact information to residents as needed.
  - c. Providing copies of all assessment documents as requested such as building permits and commercial plans.

### **The contracted Assessor has been and will be tasked with the following:**

- a. Printing, mailing, etc. any mailers which are approved by the Village to be sent out.
- b. All filling of assessment records.
- c. All assessment data entry.
- d. Scheduling/Rescheduling all assessment related appointments.
- e. Creating basic CAD drawings as needed.
- f. Coordinating with the Village Clerk for publishing public notices at appropriate times during the assessment process.

## General Quotation Requirements

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1. Proposals shall include no more than twenty (20) pages, 8 ½ inches by 11 inches.
  - i. Five (5) copies of the proposal shall be submitted.
  - ii. **Submittal Options:** The Village would ask that the submittal show a bid which provides the Village with an option (a) wherein the assessment firm would continue to incorporate the use of Village staff and option (b) wherein the assessment firm would not utilize Village staff.

Option (a) should clearly delineate what the duties and responsibilities of the Village staff would be, bearing in mind that the statutory responsibility of Village Assessor remains with the contractor.
  - iii. **Office hours.** Office hours are **NOT** required for the proposal option (a) which utilizes Village staff. Office hours would be established “by appointment only” under option (a).

When bidding on option (b) which does not utilize Village staff, please indicate how many weekly office hours the assessment office staff will have at Village Hall. The Village requires, as part of the proposal, four (4) scheduled office hours every other week. The Village Hall is open from 8:00 AM to 4:30 PM Monday through Friday. The hours are to be scheduled at the discretion of the assessment firm during business hours.
2. 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 person to be assigned as the Village’s point of contact for the work to be performed; experience with conducting a re-evaluation process; identify experience with assessment evaluation of potential tax-exempt properties; demonstrate accuracy of assessment work.
3. The proposal shall include the total annual compensation rate to provide the assessment services and be in accordance with the laws of the State of Wisconsin for assessment years 2018, 2019, 2020, 2021, and 2022 beginning not later than April 1, 2018. The Village will pay the annual compensation rate in equal monthly installments.
  - i. Bidders should include both an option (a) and option (b) price for all 4 ½ years as stated above under Assessment Software and Staffing.
4. Bidders shall express their fee for each year of this proposed contract in a not-to-exceed sum to include all of the Assessor’s costs for services as listed in this RFP. A desired monthly 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 Village will retain 10% of the total fee subject to timely delivery of the certified assessment roll to the Village Clerk.

5. 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.
6. The proposals shall identify five (5) references from municipal clients for which the bidder and the person or person to be assigned as the Village'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, and address and business phone numbers of the contact person.
7. Bidders shall provide a detailed resume of the person or person to be assigned as the Village's point of contact for the work to be performed.
8. The proposals shall also identify any and all contractual requirements that the bidder currently has.
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 Village of Grafton 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 Village.
12. The successful bidder will have at least five (5) years' experience in municipal government assessing, including re-evaluation, 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 Village of Grafton, considering experience, price and other factors.
14. The assessor shall maintain insurance coverage to protect against claims, demands, actions and causes of action arising from any act, error or omission of the assessor, their agents and employees in the execution of work. Further, the assessor shall be responsible for any and all of their agents while performing acts under the terms of this contract. Certificates of Insurance by a company authorized to transact business in the State of Wisconsin shall be supplied to the Village, listing the Village as an additional insured.

Limits of Liability shall not be less than:

- a. Workers compensation statutory limits.
- b. Comprehensive general liability, including personal injury and blanket contractual liability in the amount of \$1,000,000 per occurrence, combined single limit.

- c. Comprehensive auto liability, including property damage and non-ownership coverage in the amount of \$1,000,000 per occurrence, combined single limit.
- d. In addition to all other insurance required of the Assessor, Assessor shall purchase and maintain, during the term of the Assessment Contract, a professional errors and omissions policy of insurance to protect against claims, demands, actions and causes of action, arising from any act or omission of the assessor, his agents and employees in the execution of the work, in the total amount of \$1,000,000.00.

15. Any company may withdraw its proposal at any time prior to the submittal deadline. Sealed bids, including 5 copies of the company’s proposal, must be received at Grafton Village Hall no later than 12:00 pm on February 16, 2018.

## **Term of Engagement**

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This proposal is for the term beginning April 1, 2018 and expiring December 31, 2022.

The following is a list of key dates up to and including the date proposals are to be submitted:

Request for proposal issued:	<b>January 26, 2018</b>
Due date for proposal:	<b>February 16, 2018 (12:00 pm)</b>
Interview of Finalists:	<b>Week of February 19, 2018</b>
Selected firm notified (anticipated):	<b>February 26, 2018</b>
Village Committee/Board approvals:	<b>March, 2018</b>
Coverage beginning date (no later than):	<b>April 1, 2018</b>

## **Evaluation Criteria**

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

1. Demonstration of successful experience in providing general assessment services to a municipality of similar size.
2. Past experience in appraisal and evaluation of properties.
3. Demonstration of a high level of accuracy in assessment work for municipal clients.
4. Cost of assessment services.
5. Evidence of positive customer interaction.
6. The proposal addresses all specific services required, special conditions to be assessed and general quotation requirements in this request for proposals.



## **Right to Reject Proposals**

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

The Village reserves the right to reject any or all proposals, without prejudice and/or waive any irregularities if deemed in the best interests of the Village. In addition, the Village reserves the right to reissue all or part of this Request for Proposal and/or not award any contract at its discretion and without penalty.

The Village of Grafton reserves the right to accept the proposal considered most advantageous to the Village, which, in its opinion, meets the specifications of the RFP regardless of whether or not the terms are the lowest cost.

*All respondents accept the preceding terms and procedures in submitting a proposal.*

## **Contact Information**

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All requests for further information and proposal submissions should be directed to:

Jesse Thyes  
Village Administrator  
860 Badger Circle  
Grafton, WI 53024  
[jthyes@village.grafton.wi.us](mailto:jthyes@village.grafton.wi.us)

Thank you for your interest in this project.